

# **Formation Counselor Manual**



**The Third Order, Province of the Americas  
Society of St. Francis  
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## I. Welcome and Introduction

Initial formation in the Third Order is one of the most important gifts we as a community working together offer the world. Whether individuals eventually join us or not, initial formation helps clarify, deepen and strengthen one's understanding of our life in relationship with God and Creation. Our program enables those in formation to engage with professed members in a process of mutual discernment, growth and inspiration. The goal is to help those new to us understand and grow into our desire as an Order:

*"We are an Order because we have vowed our loving support to one another as we seek to serve Christ in the spirit of Francis and Clare, and organize our lives by our rule inspired by the Principles."*

In this understanding, formation is not simply a private, spiritual endeavor that may involve no engagement beyond the formation counselor; instead, it is an interactive and holistic entrance into the life of a loving community.

We're so glad you have chosen to be a formation counselor. Walking beside someone as they make their first steps in the Franciscan life, and then watching them grow and mature as brothers and sisters, can be exciting and joy-filled work. The work you do with your counselees will impact them in ways you are not even aware of, perhaps for the rest of their lives.

Being an effective counselor requires a variety of gifts. You will need to be able to listen and read attentively and prayerfully, and respond sensitively and pastorally. You will need to be open to different personalities, different cultural and educational backgrounds, different theological perspectives. And you need to be willing to be challenged and stretched. Inevitably, counseling will bring you face to face with your own issues. Yes, you are teacher, but you are also student. You may discover more about yourself through the counseling experience than you ever wanted to know!

Being a counselor is a sacred responsibility, and one that should be saturated in prayer. Seek the guidance of the Holy Spirit as you begin this work, and throughout your time of service as a counselor. Pray daily for your counselees and for your Assistant Formation Guardian (AFG). And pray about every report, every response, and every conversation you have with your counselee. Know, too, that you are upheld in prayer in this work by your AFG and other members of the formation team.

Thank you for the gifts you are offering through this ministry – to your counselees, to the formation team, and to the Third Order. You may not get thanked often enough, but know that what you are doing matters and is deeply valued and treasured.

## II. Counselor Role

### II. A. Multiple Aspects of the Counselor Role

Your gifts to your counselee—your areas of expertise—are that you know how to follow a Franciscan Rule, you know what it is to be a Franciscan Tertiary in the world today, and you know what it means to be part of a community committed to lovingly support one another. Those who come to us are eager to learn, and you have first-hand knowledge of what they are looking for.

In addition to your Franciscan experience, there are two practical factors that will make you a more effective formation counselor:

- Formation relationships go beyond one-on-one mentoring through written and verbal reports. Much of our formation work is also team-oriented and interactive. That means that formation counselors need to be able to interact with their counsees by telephone or Zoom, in addition to surface mail or email. You will also need to use Zoom (which you can access by telephone, tablet or computer) to participate in formation-team conversations.
- A second important aspect of being a counselor is interacting in a timely manner, most importantly with your counselee, but also with other members of the formation team. When your counselee submits a report, it is important that you respond as soon as possible (normally within 2 weeks) so the counselee can think about your ideas and try any recommendations before writing their next report. Likewise, if your AFG or other team member asks for information, it makes life easier all around if you respond promptly so no one has to call or email repeatedly.

Beyond these practical parameters, your role with your counselee is multifaceted. You are a friend, support and shepherd as they enter into their Franciscan journey. It is your job to encourage, model and teach as they learn to live by their Rule of life and begin reflecting the Franciscan charism in their own life. You speak with authority drawn from having struggled along the Franciscan path before them. You know how to be in the world as a Franciscan, and you can show your counselee the way. And you know our community and can help your counselee engage with other members, both professed and in formation.

Sometimes your counselee may discern that pursuing membership in our Order is not the right path for them. That is not a failure! Discernment may have different outcomes than we anticipate. So while saying goodbye to someone you have become close to may be sad, it is not a sign of deficiency on anyone's part. It is a sign that the Spirit, not our own wills, is doing the most important work.

## II. B. Essentials of Counseling

This is a quick list of some the essential elements for all counselors. Some of these will be addressed in more detail later in this Manual.

- Follow your own Rule of Life. That may sound obvious, but it's very important. You need that grounding to do this holy work. It's also important to be able to understand the common problems we all face in following these disciplines over the long haul, and to honestly share your own experience as you offer support to your counsees.
- Pray. Please pray for those in formation each day, and especially for your counselee and those working with you on the formation team.
- Keep aware of the need for confidentiality and honest discussion of confidentiality's limits. Be honest as you inform the counselee about the expectation of limits necessary to maintain trust and to manage formation within a team. Note the section below on Confidentiality.
- Refer often to this Counselor Manual, as well as instructions you receive from your AFG or FG. Feel free to ask questions, and to offer feedback on the Manuals and instructions you receive. We are always looking for ways to improve, so don't hesitate to share your thoughts.
- Keep your AFG informed of the counselee's growth areas, issues, problems, or questions. Your AFG is there to support you in this important work, so please call on them. If you cannot reach your AFG or if they do not respond, don't hesitate to contact the Formation Guardian for advice.
- Know about procedures that prevent abusive relationships, and in the event there is abuse, abide by the Order's *Safeguarding Our Loving Community* policy.

## II. C. Confidentiality

All communications between the counselor and counselee are confidential within the formation team. To have an effective counseling relationship, it must be safe for the counselee to share all facets of the journey. Information about a counselee is never shared outside the formation Team unless the counselee explicitly agrees. The formation team consists of the formation counselor, the AFG, the FG, occasionally the Provincial Chaplain (or assistant) or Minister Provincial, and very rarely the Bishop Protector. Limited information will be shared with Chapter when the candidate is reviewed for profession. You may, of course, also speak freely with your spiritual director/companion/guide in a confidential setting.

As counselor, your communication of sensitive information should be limited to the counselee and the AFG in most cases. The FG is also available as a resource. When appropriate, the FG will seek guidance from the Provincial Chaplain or Minister Provincial. For non-sensitive information, you are encouraged to help your counselee get to know and interact with others in the Order, such as in fellowship, convocations, ministry teams, and formation groups.

Anything that is published in the Directory is not confidential within the Third Order. You may share with other Third Order members that you are serving as a counselee's formation counselor. You may share with other Third Order members their status as Postulant or Novice, where they live, and what fellowship they belong to. Do not share anything of their personal story or struggles, your assessment of whether they are doing well or are on track, or what concerns you have about them with anyone other than your AFG, who can determine with you what personal support might be appropriate (fellowship members, area chaplains, mentors, etc.) and how to engage them. Casual sharing of sensitive information must be avoided.

Because fellowships are often involved in the candidate's life and actively engaged in their formation, the fellowship will be consulted at reviews and other times. The person in formation is a member of their local or online community, and the fellowship wants to be helpful to both the candidate and to the formation team. We do appreciate their support, but we must be careful in how we share information with fellowship members. Sharing of sensitive information can betray the expectation of confidentiality that we share with counselees. If information counselees share with the formation team becomes fodder for gossip, counselees will feel betrayed and the depth of the formation experience curtailed. If a fellowship inquires as to the progress of a counselee, please refer them to the AFG or FG to discuss further.

At review times, the formation team will often convene an online conversation with a counselee. At these meetings, sensitive information may be discussed, so the counselee will be asked whether they would like a fellowship representative and area chaplain present. If they prefer not, the chaplaincy and fellowship will be asked to give separate input for the formation team to consider.

Likewise, remember that your spouse or partner is not a member of the formation team. Do not leave files lying around, or reports open on your computer screen, where they can be easily seen by others in your household. You should not share with your spouse or partner your counselee's reports or your responses. This is especially true if your spouse or partner is also a tertiary. At some point down the road, your spouse or partner may have interactions with the person who is now in formation. Their opinions about the person should not be influenced by private information revealed during the formation process.

## II. D. Communicating with Your AFG

Most of the time, Formation goes along smoothly, but difficult problems arise from time to time. When a problem does arise, contact your AFG or the FG right away. It is far easier to answer a question or address an issue early on than to clean up a mess after things have fallen apart. Develop strategies and seek solutions as issues arise, so before any reviews you and the counselee will have a plan to address the issues. We don't want a counselee to feel blind-sided at review times if an issue is suddenly raised that was never addressed before.

If you have questions or problems in your relationship with the counselee, share these issues as you go. Occasionally, you may find that you and a counselee are just not compatible, maybe because of significant theological differences, or personality issues, or some other reason. If this happens, tell your AFG right away. The AFG can always assign the person to a new counselor, or take some other action, depending on what the issues are.

Remember that you are a part of a team, and the AFG and FG are available to support and guide you all along the way. Keep your AFG informed at least quarterly about your counselee's progress. Use the Quarterly Report Form to provide a summary of how your counselee is doing. This report is due to the AFG on the first day of each quarter, either in writing or by phone. Formation is a team effort, and these reports are an essential component. Be candid in your report and let the AFG know of any questions, concerns or joys you might have with your counselee.

### **III. Working with Your Counselee**

#### **III. A. Steps in Formation**

Aspirancy. Aspirants are greeted by an AFG for Welcome, who works with them briefly to help them learn basic information about Franciscanism and our Order and discern whether to move forward into formation. The AFG for Welcome also helps Aspirants connect with a fellowship and begin the search for a spiritual director. When both parties feel ready, a conversation is held with the Aspirant and formation team to determine admission to postulancy.

Postulancy. Postulancy lasts six months. During this time, the Postulant works at least monthly with a Postulant Counselor, in writing and/or orally. The focus in this stage is writing a rule of life in conversation with the Postulant Counselor, beginning to live by that Rule, and becoming more familiar with the Principles, Franciscan joy and Franciscan ways, including in fellowship. The Postulant also completes Safeguarding our Loving Community requirements. Around the beginning of the sixth month of postulancy, the AFG for Postulants initiates the Novice review, culminating in an online conversation with the Postulant and the formation team (when necessary, the process can be handled in writing). After this conversation, the team determines a plan towards admission to the novitiate. Once the counselee is approved, the AFG for Postulants sends the Permission to Novice Form to the Postulant, and the novicing ceremony is normally held with the Postulant's fellowship.

Novitiate I. The novitiate lasts two years, with distinct emphases for each year. First-year Novices continue to focus on living by their Rule, which has been completed by the end of Postulancy, and continuing study of Franciscan ways, including looking more deeply at the Principles and how they inform our Franciscan life. In addition, Novice 1s study Franciscan history and theology. The norm for Novice 1s is monthly participation in a group forum with other Novices, led by Novice 1 Counselors. Around the beginning of the twelfth month, the AFG for Novice 1s initiates the mid-Novice review, culminating in an online conversation with the Novice and formation team. The team determines the path towards progression to Second-year Novitiate.

Novitiate II. Second-year Novices continue to live by their rule, and with the engagement of the formation team, may revise the rule to directly align with our Principles. They integrate the Principles into daily life, working one-on-one with a counselor to whom they report bi-monthly. Additionally, the counselor and a service-group mentor oversee second-year Novices as each Novice explores each of the three Ways of Service through a service project in the Order, the Church, or the world. This project may focus on the Order's missional priorities (such as sacred ecology and racial harmony) or other ways of expressing Franciscan spirituality. Every other month the second-year Novice joins with other second-year Novices in group conversation reflecting on how their projects express their Franciscan spirituality and clarify what God gives them to do. Around the eleventh month, the AFG for Novice 2s initiates the profession review, culminating in a conversation with the Novice and formation team. The team recommends to Chapter a plan for the Novice to move towards profession. The recommendation for profession is communicated to Chapter by the FG.

### III. B. File Maintenance

When you receive a new counselee, whether a new postulant or a Novice who is being reassigned, you will be given access to or mailed a counselor file from your AFG. The following instructions pertain to online file management, with an addendum at the end of this section concerning maintenance of hard-copy files for those who prefer that method.

The *online file* includes several sub-folders:

Doe, Jane

- 1 Aspirancy
  - Application
  - Spiritual Autobiography
  - Recommendation letter
  - Loving Community documentation
  - Significant correspondence
- 2 Postulancy
  - Postulancy review documents
  - Rule of Life (ROL) drafts
  - Reports, responses, significant correspondence
- 3 Novice 1
  - Novice review documents
  - Approved ROL for Novice 1
  - Reports, responses, significant correspondence
- 4 Novice 2
  - Mid-Novice review documents
  - Approved ROL for Novice 2
  - Reports, responses, significant correspondence, including reports on service projects, and observations of the project mentors
- 5 Profession review documents
- 6 Quarterly Reports

A critical convention to observe with online files is to always include the date in the file name. This will keep everything logically organized in chronological order within a sub-folder. The convention is:

4-digitYear[space]2-digitMonth[dash]2-digitDay[space]Contents

For example:

“2021 03-14 P1 report and response ” would be the file name for a first postulant report received on March 14, 2021, with your imbedded response.

If your response to a report is a separate document, you would have two files:

2021 03-14 P1 report  
2021 03-19 P1 response

If you had an important clarifying phone call in between, you might have three files:

2021 03-14 P1 report  
2021 03-15 conversation on Daily Office  
2021 03-19 P1 response

Because files are maintained under a particular counselee's named, online folder, you do not need to include the counselee's name in each individual file name (note that the example file is not named "2021 03-14 Jane Doe P1 report"). If including the counselee name is helpful to you, that works, too.

Maintaining files online is preferred because it makes sharing documents among multiple formation team members much easier, and saves on postage time and cost. However, a few counselors may prefer to maintain hard copies. If you are such a counselor, work with your AFG to see if the AFG can help you maintain an online file as well, such as by your emailing documents to the AFG to upload as you generate them.

***Hard-copy files*** include everything listed above. The counselor checklist is stapled to the inside front cover, and the approved ROL to the back cover. Whether you add documents in front of or behind existing documents, be consistent, and make sure each document is clearly dated. That way, all files will remain in an organized, sequential order.

### III. C. Beginning with a New Counselee

Ideally, you will be included in a videoconference conversation with your counselee and other members of the formation team. In preparation for this meeting, please read important parts of your counselee's file to get acquainted with the individual. These parts include the autobiography, notes of previous reviews, recent reports (if you don't have time to read them all), and the rule of life (if it has been written). If you were unable to participate in the online conversation, please write, email or call your counselee to introduce yourself. However you make initial contact, please follow up with an email with a current copy of your own autobiography and contact information.

If your counselee reports to you by email, upload (or print off) all reports and responses to reports, always marked with dates and report numbers, and drop them in the appropriate subfolder (or paper file). Also include any significant correspondence, documentation of oral reports, summaries of phone or online conversations, or anything that might be useful to the AFG or later counselors.

All reports made before novicing are numbered as postulant reports, P1, P2, P3, and so forth. All reports subsequent to novicing are numbered with an N beginning at number 1. The first report made after novicing is N1, then N2, etc. until profession.

When it is time for review or reassignment, please upload any remaining documents (or mail a paper file to the AFG). You will be asked for your evaluation, briefly in writing and as part of an online review conversation. When the counseling relationship is ended, delete all electronic documents on your personal computer, and return any remaining paperwork to the AFG, as a matter of confidentiality.

### III. D. Developing a Postulant Rule of Life

When you receive a new postulant, the first step after getting to know one another is to begin developing the Rule of Life. This will be done in stages over three months. Then the postulant will live with and fine tune the rule for three more months.

The postulant begins the process with a daily commitment to the Community Obedience and a consideration of what other commitments or “rules” exist in their life, beginning with the Baptismal Covenant (ordained individuals could be encouraged to consider the vows made at ordination).

Reflecting upon the affirmations concerning their baptism can lead the postulant to think about how they are living their faith and how a rule of life can help them become the person God is calling them to be. You will also encourage your postulant to reflect on activities in their lives they currently practice, such as prayer, study, church attendance, regular exercise, that they might want to include in their personal rule of life. The postulant should work closely with their spiritual director during this process.

Aspirants all read the introduction to *Forming the Life*. During each of the first three months of Postulancy, you will ask your counselee to read four or five chapters from Part I of *Forming the Life*:

- Month 1: The daily foundations—chapters 1, 3, 4, and 11
- Month 2: Weekly, monthly and annual foundations—chapters 2, 12, 10 and 13
- Month 3: Going beyond the foundations—chapters 5, 6, 7, 8 and 9

During each month, your postulant will work on developing the corresponding parts of their rule. Their reports should include how the chapters they have read inform their emerging rule of life as well as their reactions to living with the Community Obedience. Because so much information is being covered in these first months, this is an ideal time to engage in conversation by phone or video rather than solely in writing.

As you help the postulant develop the rule, please be sure to use these aids to help you, which are

included in the appendix:

- Postulancy Welcome Letter
- Postulant Counselor’s Guide to Basic Rule Requirements
- Rule of Life Instructions for Postulants
- Guiding Questions for Writing or Enriching Your Rule of Life
- Rule Samples

By the end of the third month the postulant should have developed a good draft of a workable rule of life. They would then be expected to live with their rule and reflect on their practice monthly with you. This provides three months for “trying it on” and making any necessary adjustments while becoming familiar with what it feels like to live under a rule. During this time, the rule is in a trial state and you and the counselee can change it as needed. Requirements for each part of the rule are included in the next section, so keep that information in mind as you work with your counselee. At the Novice review, the final draft rule will be formally approved by the AFG for Postulants.

After the basic rule is developed in the first half of Postulancy, study during the second half of Postulancy turns to a focus on Franciscan joy, biographies and history. A list of suggested books, articles and videos for Postulants is included in the Formation Bibliography. You will help your postulant choose one or more of these resources each month to reflect upon.

### III. E. Working with a Novice 1 Not in a Class

Guidance for adapting the class curriculum to one-on-one reporting (to be added).

### III. F. Supporting Novice 2 Service Exploration

Guidance for mentoring Novices unable to participate in a service formation group (to be added).

### III. G. Methods of Reporting

We encourage counselors to engage with their counsees in a variety of ways, including writing, phone calls and videoconferencing.

**1. Written Reporting.** A common form of reporting is by writing, usually by email, using the Formation Report Form (see Appendix C). In each section, the counselee should share

how they are doing with that section of the Rule, as well as some reflection on the topic. They might share, for example, struggles they are having establishing a regular prayer time, or incidents at work where they were able to reflect Christ's love, or what they have learned from their studies. In a later section of this Manual, we will provide more detail on what should be expected in each section.

Every question on the report form should be answered. Some of the questions are there to help everyone keep track of details like date of last confession or retreat. Others are invitations for the counselee to reflect more deeply on various aspects of this life. Responses to some sections may be brief some months, but over time you should see meaningful reflections in every section.

**2. Letter Reporting.** Some counsees find the report form too constricting and prefer to report in a more freeform letter. This is acceptable, but the counselee should still use the report form to double-check the thoroughness of their letter. They can simply write, “See letter” for subjects they have covered, and provide fuller answers on the report form to any topics not addressed in their letter. Otherwise, you are left to cross-check the letter to make sure your counselee is thinking about and progressing in all areas. You may also ask that at least once a quarter, the counselee provide a complete report using the standard format. Some counsees like to write a substantive cover letter in addition to the report, and this is always acceptable.

**3. Oral Reporting.** At least occasional oral reporting is encouraged. The give and take of regular contact can help build a sense of engagement and community. In addition, not everyone is confident or comfortable expressing themselves through the written word. Neither literacy nor writing ability is a requirement for the Franciscan life. Oral reporting provides an alternative way to do formation for those who have trouble with written reporting. Even for those who do express themselves well on paper, an occasional oral report can be an invaluable tool for building relationship through face-to-face dialogue and immediate feedback.

Summarizing an oral conversation is important, both to keep track of progress month to month, and to share with the rest of the formation team at review times. When you sit down with the counselee to do an oral report, both of you should have a blank reporting form in front of you to use as a guide. It may be helpful to ask the counselee to write some notes in preparation for the session, but this is not required. Go through the report, asking each question on the form. Take brief notes on the form, including important successes or struggles of the counselee, and your recommendations. When the session is over, summarize the parts of the conversation that you both will want to recall in celebration or to keep track of progress. It is helpful to do the write up very soon after the session while the memory is fresh, normally within 24 hours. If you are new to this, share a copy with your AFG to make sure you are capturing useful details.

#### **4. Creative Reporting**

For Novices who wish to, a few of their reports or portions of reports may take some other form besides the standard written report, including the option of creative expression (like dance, art, musical composition, video, photo essay) accompanied by an explanation of it, so that they are documented and understood.

**5. Frequency of Reporting.** Postulants report monthly. Most Novice 1s participate in a monthly class and report quarterly to the counselors who mentor the class. Novice 1s who are not in a class should report monthly to their formation counselor. There is a specific focus for each monthly class (or report) during Novice 1. Novice 2s participate in a service support group every other month and report to their counselor in the intervening months. Novice 2s who cannot participate in support groups should engage with a mentor in alternate months and report to their counselor in the intervening months.

### III. H. What to Look for in Reports

**1. General Thoughts.** A primary focus of postulancy is developing regularity and comfort with the daily, weekly and monthly spiritual foundations: attendance at Eucharist; Self-examination; Personal Prayer; Daily Office; Community Obedience; Study of scripture and formation materials; spiritual direction and participation in fellowship. All these practices should remain regular throughout the novitiate, when the focus expands to other aspects of the rule and the Principles. It is important to remember that we each live with different demands on our time and attention. One role of the counselor is to help counsees find expressions of our spiritual foundations that work in the context of the individual's lives, not some abstract life of perfect balance. A person working full-time with young children at home will likely have a daily prayer routine that is much different from a retired person who lives alone. Both may be called to this life, and our job is to help each person figure out how to live it.

Remember that formation is a team effort. If you feel uncertain about how much flexibility is advisable in a certain situation, please call on the team for advice. Ask your AFG, who may also engage the FG, area chaplain, or fellowship members to help.

**2. Mutual Accountability.** Part of your job is to encourage your counselee with accountability that is flexible and loving. When counsees develop their rule, they are expressing desires they want to live up to. There are three ways you can each ensure that desired commitments are not lost.

- Refer to the rule frequently. Make sure the counselee's rule is pasted into the report form to create a personalized template. That way both of you can easily reference the rule when writing and responding to reports. In this way, you can help your counselee when they overlook or ignore commitments they want to fulfill.
- It is helpful for each of you to quickly review the previous month's report and response before writing and responding to a new report. This way, you can help your counselee keep track of their progress and your counseling relationship will be more effective.

- Be timely in your interactions, both in reporting and responding to reports.

**3. Incomplete or duplicate reports.** If reports appear to be a checklist without details, or if they are incomplete, or if the same answers are duplicated from report to report, you have several options. A quick follow-up call or email might clear up the missing information. If the problem is more pervasive or habitual, a longer phone or online conversation is probably the more effective way to figure out what is going on. Sometimes this is typical of a postulant unfamiliar with the reporting process, but it may be a sign of a slump, loss of interest, life problems, problems relating to the counselor, or difficulty with writing. If problems persist even after you discuss them together, consult your AFG. Remember we are a team.

**4. Rule Revision.** During postulancy, a major focus is developing and fine-tuning the rule in consultation with the postulant counselor. During this time, the rule is not officially approved, and the counselor and counselee can experiment, as long as required elements are included. The rule should be developed in the first three months and fine-tuned in the latter three months. At the Novice review, the rule will be formally approved by the AFG for Postulants. Except for major life changes warranting an update, this approved rule should be in effect through the Novice 1 year. The Novice may anticipate desired changes to implement at the time of the mid-Novice review. As part of this review process, an updated rule will be formally approved by the AFG for Novice 1s. Likewise, during the second Novice year, the Novice should live by a stable rule until the profession review, when a revised rule will be approved by the AFG for Novice 2s. An exception would be for those Novice 2s who wish to develop a Principles-based rule through the Chaplaincy program.

Some counsees decide their Rule isn't working for them, and they change it without consulting the formation team. Once in a while, please compare the Rule as shown on the counselee's report to the Rule approved by the AFG. You may need to explain how the Rule functions for us: once it is approved, it is meant to be a firm foundation on rock, not changeable sand. After postulancy, only the AFG can approve changes to a Rule, so if your counselee requests a change between reviews (something consistently is not working, or there has been a major life change), please pass the request along to the AFG.

## **5. Point-by-Point Detail**

This section deals with reporting on basic rule requirements.

- Eucharist. At a minimum, the counselee should tell you that they attended Eucharist every Sunday, and any major feast days during the period. At least now and then, invite them to share a bit more, about what Eucharist means to them, or some special experience they had or a special service they attended.

“Major feasts” refers to the Principal Feasts of the church, found on page 15 of the Book of Common Prayer (BCP). The ones that may not fall on Sunday are Epiphany, Ascension Day, All Saints Day, and Christmas. Reasonable effort should be made to attend Eucharist on these days if it is available (aside from Christmas, few Episcopal churches celebrate the non-Sunday feasts on the actual day). If attendance at Eucharist is not possible, these days should be recognized in the Daily Office.

- Penitence. Self-examination is often a new practice for people entering formation, and difficult to establish as a habit. Some do it at the end of the day. Others find they are just too tired at night, and that it works better to do the self-examination as part of their personal prayer time or the Daily Office. The time of day is not important. What matters is building this practice into their daily routine. Each report should indicate how they are progressing with that effort.

There are many ways to do the self-examination. There are a couple of suggested formats in the *Devotional Companion*. Some use the Litany of Penitence from the Ash Wednesday service. There are many more options available online. The Jesuit examen format or one of its variations is a popular alternative. Others find the prescribed formats just too cumbersome for daily use. All that is required is a glance back through the previous 24 hours, noting any occasions for thanksgiving or penitence.

Personal confession is also a new practice for many Postulants. As an annual practice, it is not required to be completed before novicing. But if the practice is unfamiliar to them, they may want to start preparing for it early. Those coming from Protestant backgrounds may need guidance or coaching on how to begin. The formation counselor can be one source for information and encouragement. The spiritual director may be another.

The counselee is not expected to report to you the *content* of either their sacramental confessions or their self-examination. Please honor your counselee's privacy. What you are interested in hearing about is the *process*.

- Personal Prayer (PP). Prayer is one of our foundation stones as Franciscans, so pay particular attention to this section in the reports.

This, too, may be a new practice for some. Encourage your counselee to experiment with many different forms of prayer: meditation on scriptures, rosary, centering prayer, “conversational” prayer, sitting in silence, journaling, praying the news, as well as intercession and thanksgiving and much more. For some people, it is easier to establish this discipline if it is done at the same time every day. Those with more complicated schedules may need your help in coming up with a workable routine. It also may help to designate a special place for prayer, a special room or maybe just a special chair.

Your counselee's prayer time may not look quite like yours, and that's ok. Some counselees, for example, find contemplative prayer difficult and frustrating, and are more comfortable with scriptural reflection or “conversational” prayer. Your job as counselor is to encourage them to experiment with different ways of praying, and to find prayer methods that are fruitful for them. Remember that Prayer, as one of our three Ways of Service, is one way we prepare ourselves to carry out the Order's Aims in the world.

If you see reference to the Daily Office in the Personal Prayer section, that may be an indication that your counselee is confused about what we consider to be Personal Prayer. In our rule, the Daily Office is considered a form of communal prayer and an expression

of our mutual commitment under Obedience. Personal Prayer is meant to be daily, dedicated, uninterrupted time alone with God. It's not the amount of time spent, it's the daily showing up for that appointment that is important.

- Self Denial. This section should include specifics of how they are living out the details of their own Rule. Reflections on the meaning of self-denial are fine, as long as they include what they are *doing* as well.
- Retreat. This is required annually, and does not have to be done before novicing. Most reports will not have much to say here. But they should tell you about arrangements they are making, or experiences from a recent retreat. If the counselee is approaching a year in formation with no retreat, or if it has been more than a year since their last one, stress the importance of this practice and ask what their plans are.

To meet this requirement, a retreat should be 24 hours of silence, ideally with a night on either end. Meeting with a spiritual director during the retreat, or participating in structured retreats where a presenter offers several meditations over the course of the day or weekend, are good options. Ideally, the rest of the time, such as meals, should be spent in silence. Be flexible in helping your counselee find a workable option. If a structured retreat does not have silent meals, the retreat center may have a smaller, silent dining room. Even if that option is not possible, a full weekend retreat with some talking may be much more useful than trying to do a retreat at home in total silence for 24 hours. Parish and clergy retreats and TSSF convocations normally do not meet this requirement because they are focused on group-centered activities, so encourage your counselee to do a silent retreat in addition to these group-centered experiences. Adding an extra day to such a weekend is one option.

We recommend that, whenever possible, the counselee go away to a retreat center or some natural setting for their retreat. Home retreats are difficult, because the TV and computer and telephone are all within arm's reach. But finances or other limitations make home retreats the only viable option for some people. Retreats at home are acceptable. Resources for personal retreats can be found online or through Chaplaincy.

- Study. Reports should state what they are doing with regards to their own Rule commitments. Make sure they are reading assigned formation materials, including chapters each month of *Forming the Life of a Franciscan*. They should be sharing their reflections and reactions to one of the questions at the end of each chapter, or other reflection questions you assign. One alternative to reporting on *Forming* in the monthly report is to use this as an occasion for a monthly telephone check-in, and discuss the material that way. If so, simply make a note in the file as to the chapter read and any important insights. Your counselee should also be regularly studying materials by and about Francis, Clare, and Franciscan spirituality. You can help your counselee to incorporate their studies into their Prayer and Work, so their learning goes beyond gaining intellectual knowledge to help them carry out the Order's Aims in the world.

Bible study (devotional or scholarly) is also required. If they are spending some time reflecting on the lectionary readings, that is adequate unless their Rule states otherwise.

- Simplicity. This section should include specifics of how they are living out the details of their own Rule. This is another fundamental Franciscan concept, so you should see growth in their understanding and application of Simplicity over time as counsees internalize our Principles and other learning.
- Work. It is common to see “no change” or “nothing to report” in this section, but we are looking for more than that here. They should report not just whether they are *doing* the things they committed to in their Rule; just as importantly, they should be sharing what *matters* about their work, how it furthers our Aims, whether it feels meaningful to them, whether they understand it as ministry, how they are affected by their work activities, what their interactions with coworkers are like, and so on.

Sometimes counsees ignore their “day job” as work and focus only on parish and volunteer work that may seem more obviously church-related or charitable. Challenge this compartmentalization. Our Franciscan calling permeates all our lives. It is part of your role as counselor to help your counselee perceive and address the spiritual aspects of even the most mundane-seeming work. Your questions and encouragement can help your counselee see how Franciscan values can be reflected in every sort of daily activity.

If someone is retired, help them to perceive how they can still further our Aims through volunteer work; grandparenting or other family or neighborhood nurturing; contributing in new ways to the life of their parish and the Order; caring for Creation; and other ways.

- Obedience. Obedience in the personal rule is really about commitment to the Order as a loving community. Below are five selected highlights of the ways we agree to support one another.
  - Daily Office. Our goal is to share this prayer every day as an act of unity in our geographic dispersion that also ties us to the larger church and the communion of saints. Acceptable forms of the office are the BCP, any prayer book from any Anglican province, the CSF or SSF Office book, or the Lutheran Book of Worship. The New Zealand Prayer Book is a popular alternative. Many use the SSF or CSF office books. It is perfectly acceptable to do the Office online. The TSSF website offers several links to Daily Office resources. Mission St. Clare is a popular one, as is The Daily Office Online. Some resources are audio so you can listen to the office while driving or doing something else.

As part of the daily routine, the counselee should be checking for special days of observance, both in the *Devotional Companion* (DC) and their prayer book or Office book. The calendar in the DC is especially important as a way for the counselee to get familiar with our Franciscan saints and history. If the reports

don't mention using the calendar, ask about it and make sure they understand its importance.

- *Community Obedience*. This is another daily activity. Make sure your counselee understands what is to be included: the introduction (“Both here and in all your churches...”), reading of the *Principles*, directory intercessions, the designated collects, and one of the closings. This can be done in conjunction with the Office, or personal prayer time, or at another time.
- *Contributions*. All members of the Order are expected to make a financial contribution to the Third Order at least annually. This is an important part of sharing the responsibility of the Community. The contribution amount is strictly confidential between the Bursar and member, and is never revealed. Sometimes a counselee will ask for guidance about how much to contribute. The decision is theirs alone, but you can refer them to the annual budget to give them an idea of needs and opportunities. The budget is posted on the TSSF website.

We can all use reminders sometimes, so check in with your counselee before a review to see if they have made a contribution. If repeated reminders are necessary, inquire more deeply. Is there ambivalence? Uncertainty about amount? Financial hardship? In the latter case, you can reiterate that no contribution is too small. Also, there are donors in the Order willing to contribute on behalf of those with limited income.

- *Spiritual Direction (or SD)*. Having a Spiritual Director is one of the three major supports we want in place for all our counsees (the others are the fellowship and the formation team). Having a spiritual director is required of all members of the Order. The counselor and fellowship help the counselee in living the Franciscan Rule and Principles, and with matters specifically relating to the Third Order. Broader matters of spirituality are the province of the Spiritual Director.

At the beginning of formation, the AFG sends the SD a copy of the *Principles* and our *Franciscan Guide for Spiritual Directors*, with a note that welcomes their questions or concerns at any time during formation. Beyond that, we do not contact the Spiritual Director. We recognize the relationship with the SD as private and confidential. If the SD seems to be telling the counselee things that are different from TSSF expectations, we clarify expectations with the counselee, not the SD.

During formation, the counselee should meet with the SD once a month if possible. Quarterly meetings are the minimum. The report form asks for the specific date of the last meeting with the SD, which can help both the counselee and you make sure the meetings are occurring regularly.

- *Fellowship*. Joining TSSF means joining a community, with all the joys and challenges that come with that. The local, online or telephone fellowship is a vital piece of connecting with the community. While not strictly required, involvement

in the local community is an important demonstration of the candidate's ability and willingness to engage with the rest of us and be part of the family. If your counselee is not attending fellowship regularly, please explore this in conversation with the counselee. If practical reasons like distance or scheduling are the issues, there are now many options for telephone or online participation, and our Provincial fellowship coordinator can help the formation team find a workable solution. If there are other issues that you and the counselee can't resolve, please consult with your AFG.

In addition to formal fellowship participation, encourage informal interaction with other tertiaries, such as meeting for coffee or lunch, attending church with another tertiary when you might be traveling nearby, etc. When time and budgets allow, arrangements should be made to attend regional and provincial convocations. Scholarships are usually available if needed. Dates and contacts are posted in *Hot News*. Occasionally, organized pilgrimages are available, either to local sacred sites or internationally

A growing number of tertiaries build a sense of relationship beyond fellowships through the computer, mainly through Facebook (friending individual tertiaries and visiting group TSSF pages). Engaging in joint ministry through the ecumenical Franciscan Action Network or other ministries may be another option for connecting with the community.

### III. I. Responding to Reports

**1. Timing of Reports.** Regular and timely reporting provides continuity and momentum, allows the relationship with the counselor to develop, and provides opportunity for the formation team to address problem areas early in the process. Timeliness also enables better integration of reporting with group aspects of formation.

If a counselee is occasionally late with a report, that isn't a problem. Life happens, and things come up. If they are as much as a week late once in a while, that's fine. If they are going to be as much as two weeks late, they should let you know. If you have heard nothing from them for as long as a month, follow up with them and see what's going on. If reporting delays are frequent or habitual, the AFG should be notified to discuss a course of action.

**2. Timing of Responses.** One of the most frequent frustrations for a counselee is lack of timely feedback from the counselor. When your response to a report comes days before or even after a subsequent report is due, your feedback is not helpful in moving a counselee forward. Many counsees feel reticent to confront their counselors when this happens. So they feel stuck. Responding in a timely manner to your counselee is probably the simplest aspect you can control in determining how satisfactory the formation relationship will be.

When you receive a report, acknowledge receipt right away, normally within a day. Tell the counselee when they can expect to hear back from you. Give yourself enough time to carefully read, reflect, pray, and compose your response.

Responses should normally be sent within two weeks. If you are traveling or otherwise occupied and cannot respond within two weeks, let the counselee know why you are delayed and when they can expect to receive your response. If it is likely to be as long as a month before you can respond, let the AFG know so they can respond to the report for you. If you need time off to take care of personal issues, that's understandable and perfectly fine. Just let your AFG know so other arrangements can be made to care for the counselee.

**3. Preparing your response.** Read the report carefully. Listen from the heart. Then pray about the report and your response. Briefly review the previous report and response to see if recommended follow-up occurred. When you are ready, compose your response. You may want to let your response sit for a day or so before sending, particularly if there are challenges or delicacies.

Remember that much of all human communication is non-verbal. This makes communication in writing very difficult. With no body language, appearance, facial expression, or tone of voice to guide us, we must read with great care and discernment. We must be equally careful in our written expression.

In every report, look for and affirm the good points. Give positive encouragement and affirm the counselee as a person. Lift up, support, and nurture what God is already doing in their life. Acknowledge the successes, strengths, and progress shared in the report. Be sensitive to areas where a pastoral touch is needed, and address those with loving care.

There are many acceptable ways to respond to reports. Some counselors go through the report point by point. Others pick a few highlights to focus on, both affirming the positives and offering challenges in areas that need work. Some like to write their responses within the original report in a different font or color. Any of these ways are fine, and largely a matter of style. You may want to vary your approach, depending on the need. What is important is to provide substantive responses that are well thought out, and provide support and encouragement, as well as guidance and gentle challenges where appropriate.

Share your own experiences appropriately and honestly. Try to relate to the struggles they are having. If they are having trouble establishing a daily prayer practice, for example, share with them your own experience with prayer, perhaps how you sometimes struggle to pray, along with ways you have learned to overcome difficulties. But remember this is their journey, and it might not exactly match yours. Encourage them to explore solutions that fit in their own life and circumstances. Be sure the report is more about the counselee than you.

Remember formation is not just about general spirituality. We are forming the counselee as a Franciscan. As appropriate, use examples from Francis' life, or talk about the *Principles* and how they apply, or focus on Franciscan essentials like simplicity and humility. Notice how these aspects of our charism are beginning to manifest in your counselee's life, and affirm them when you see them.

As a counselor, you should encourage your counselee to go beyond telling you the details of their Rule of Life (although you do want that, especially early on in formation). The Third Order life is about *all* of life. This is not something we do in addition to the rest of our life. Rather, this infuses and permeates everything we do. Encourage your counselee to share their personal journey, their struggles, their joys and hopes. Over time, as they become more and more Franciscan, you should begin to see a holistic understanding of our calling emerge.

Try not to get tangled up in the counselee's personal drama. It is not your job to address problems with emotions, or finances, or employment, or relationships, or fellowship dynamics. Your job is to guide them in following their Rule of Life and living the life of a Franciscan, not to solve problems for them. Try not to give direct advice about anything except following their Rule. For every other challenge, invite them to pray about it and follow the promptings of the Spirit. It is always appropriate to ask them to discuss difficult situations with their spiritual director.

#### **4. Communicating in a Variety of Ways**

Not every counselee or counselor is good at or enjoys writing. Non-verbal cues are missing from written communication. Immediate feedback and give-and-take are more difficult in writing than in conversation. For these reasons, we encourage you to engage with your counselee not just in writing, but with occasional telephone or video conversations. These conversations don't have to be lengthy or "weighty." One good topic for oral conversations is to talk about chapters from *Forming the Life* or other study. You can go into greater depth in a phone conversation, and taking long notes is not necessary. Simply keep track of chapters that have been covered. You might want to talk about special prayer concerns or other life events. We are a community, and informal, joyful bonding is encouraged. Just as coffee hour after a church service provides an opportunity to develop friendship, so can oral check-ins in between formation reports.

**5. Addressing Problem Areas.** Many reports reflect difficulties with one or more aspects of the counselee's Rule of Life. The counselee may not be aware of the importance of keeping their Rule, but you are, from your own life experiences as a Franciscan. The counselee is building habits and disciplines that will carry over into profession and last a lifetime, so it's important to get these practices firmly established during formation. Don't be afraid to offer challenges in those areas that are proving troublesome to your counselee. There is no need to lecture, but do be clear about the expectations. Gentle guidance and leading questions are appropriate responses. Examples might be "Have you tried...", or "What has your experience been with...". On occasion, it may be appropriate to be more direct, with something like, "Annual Confession is a requirement for everyone in the Order," followed by some suggestions about preparing for confession or finding a confessor.

## IV. Reviews

### IV. A. Timing of Reviews

Years ago, counselees were expected to write 6 Postulant reports and 24 Novice reports, then would be considered eligible for profession. The reports could be done at their own pace. If they didn't report monthly, the process would simply take longer.

More recently, reviews were based on elapsed time in an effort to tighten up the process. But that sometimes did not allow for much flexibility. Now, with the differentiation at each stage of formation, some periods have greater flexibility than others.

The **Postulant review** occurs when an aspirant has completed application requirements and feels ready to begin formation.

Postulancy normally lasts 6 months, so the **Novice review** typically begins at the beginning of that last month. However, the counselor can have some discretion in advising when to launch the review, depending on how well the Postulant is doing at developing and living their rule.

During Novice 1, each month's class or report is tied to a specific topic, so completing the 12 months with timely participation and moving to the **Mid-Novice review** at the prescribed pace makes the process flow better. The Mid-Novice review is initiated at the one-year mark, or sometimes a month or more before to allow time for the review paperwork to be completed and to stagger the work for an AFG.

If the Novice 2 year flows smoothly, the **Profession review** is launched in the last quarter of the counselee's year. Profession requests are voted on by Chapter at monthly meetings as close as possible to the end of the second Novice year.

Because of the need to line up subsequent class placements or new counselors, whenever there is a significant disruption in the flow of formation, please let your AFG know quickly so calendar adaptations can be made.

All reviews are initiated by the AFG, but the AFG relies on the counselor to keep an eye out for upcoming reviews as well. If you see that a review time is approaching, alert your AFG so they can get the paperwork started.

File Reviews. In addition to the above scheduled reviews, you or the AFG may ask for a less formal consultation to address a complex issue with your counselee. In this case, the AFG will normally read the reports and responses and consult with you (and possibly others) to jointly decide how to proceed. If your AFG determines that a file review is in order, send or upload the counselor file.

## IV. B. Review Process

All reviews, whether for Novice, mid-Novice, or profession, follow a similar process (the Postulant review is simpler). The AFG contacts the counselor to make sure everything is on track for the review to proceed. Then the AFG asks the counselee and counselor to reflect on certain questions. In most cases, this work is in preparation for an online conversation with the counselee; the counselor; the receiving counselor; one or more AFGs; and sometimes the FG (especially for Postulant and profession reviews). To maintain confidentiality, a fellowship representative and area chaplain are invited to participate in the conversation with the approval of the counselee. If the counselee chooses not to include them, these participants in the review process are asked to submit separate, written feedback in response to standard questions.

After the conversation, the counselee submits summary thoughts to the AFG, who compiles input from the counselor, fellowship and area chaplain, provides summary feedback to the counselee, and forwards the file to the new AFG.

When you are notified by the AFG that a review is being started:

1. Check to make sure the file is complete. All reports and responses should be numbered and dated. Also include relevant correspondence, documentation of oral reports or significant telephone conversations, and any other background you think may be helpful to the team. It is most helpful if you put all documentation in date order using the file-naming convention. Update the Counselor Checklist with important milestones.
2. Collect your thoughts about the specific review questions. For an oral review conversation, you need only write down brief notes to help you remember what to touch on. Include any areas of growth or progress you have seen, as well as areas which might need some attention.
3. When all is in order, let the AFG know that everything has been uploaded, or mail the file to the AFG so the AFG can prepare for the review conversation.
4. After the review conversation, make any changes to your notes and submit them to the AFG to be compiled with other input.

At profession, the FG will destroy all records pertaining to the person's formation. If you have corresponded electronically, delete all electronic correspondence from your computer.

## IV. C. What to look for in Reviews

The purpose of a review is to bring together the counselee and formation team in supporting the growth of the counselee into the fullness of our Franciscan vocation. The point of a review is to help, not to judge.

As counselor, your voice in the review process is crucial. You have had direct contact with the counselee over time, and you have seen their growth and struggles first-hand. Of everyone on the formation team, you know the most about how are they growing in humility, love, and joy;

how their life reflects our Object; how deeply they understand and promote our Aims through prayer, study and work; how they contribute to and strengthen the mission of TSSF.

At each stage of review, the formation team focuses on different questions:

#### Postulant Review:

- After this period of initial exploration, what are some aspects of your sense of calling to begin formation with TSSF? What has brought you to this point?
- What do you look forward to in this process?
- What concerns do you have?
- What kinds of support would be helpful to you in the next few months as you develop and live by a personal rule, and get better acquainted with our community?

#### Novice Review:

- Do you want to join our community as a Novice? Why?
  - *In addition to the Postulant's desire and reasons, here we want to look at how helpful engagement with the formation program and fellowship has been for the Postulant, as well as other opportunities for engagement and support, such as chaplaincy.*
- How has writing and living your Rule shaped your heart and mind for the Franciscan life since you began formation?
  - *Here we want to look at how well-established the Postulant has become in the daily, weekly and monthly spiritual foundations. Do they need support or encouragement in these practices? How are they growing into the other parts of their Rule and our Principles?*
- Looking forward, what challenges may require attention from you and your formation team? (your Formation Counselor, Assistant Formation Guardian, Fellowship, Spiritual Director)
  - *Here we want to proactively line up whatever supports may be needed for the Novice 1 year.*

#### Mid-Novice Review:

- Do you want to continue in formation? Why?
- Thinking back over the last year since you became a Novice, how has your Rule influenced how you reach out to others and serve?
  - *Here we want to look at how consistent the Novice has become in the daily, weekly, monthly and yearly spiritual foundations. Are there any areas where they need support or encouragement in these practices? How have they been faithful to the other parts of their Rule?*
- How have our Principles helped you to grow in humility, love, and joy?
- How has our Order as a loving community helped you to understand and follow Francis and Clare?
  - *Here we can explore highlights of their understanding of the Franciscan tradition and how they have integrated that tradition into their lives.*
- How have you contributed to the life of the Order?
  - Fellowship, class participation, chaplaincy, other?

- Looking forward, what challenges may require attention from you and your formation team? (your Formation Counselor, Assistant Formation Guardian, Fellowship, Spiritual Director)

Profession Review:

- Do you want to be professed? Why?
- What has been a particular blessing of your formation experience, especially over the past year?
  - *Here we can explore the fruits of the exploration of Ways of Service in the N2 year.*
- What will be an area of continuing growth in your life-long formation?
- Once you are professed, what gifts, talents, or abilities would you add to our loving community as we support one another in lives of prayer, study and work?

**To help us improve the formation process, we also consider:**

*[For Postulant Review:]*

- What helped you feel welcomed into the formation process? What would you suggest to improve the welcome for future aspirants?
- Was the application process clear?

*[For Novice Review:]*

- What has supported or hindered your relationship with your counselor and other members of the formation team?
  - *Here we want to look at how participation in the formation process has promoted reflection, sharing and growth.*
  - If problems, what solutions did you try or do you recommend?
  - How have you sensed your relationships with your counselor, peers, fellowship, and other members of the formation team evolving?
- Regarding the development of your rule:
  - Was the process clear?
  - Did you get the resources and support you wanted or needed?
  - What improvements would you suggest for future postulants?

*[For Mid-Novice Review:]*

- Thinking of how we might improve our formation program, what supported or hindered your relationship with your counselor or class mentors, and other members of the formation team?
  - If you had problems, what solutions did you try?
- Regarding the N1 class:
  - Were the expectations clear?
  - Did you get the resources and support you wanted or needed?
  - Was the experience helpful? What would make it more helpful for future novices?

*[For profession:]*

- Thinking of how we might improve our formation program, what supported or hindered your relationship with your counselor, NExuS group and other members of the formation team?
  - If you had problems, what solutions did you try?
- Regarding the service exploration:
  - Were the expectations clear?
  - Did you get the resources and support you wanted or needed?
  - Was the experience helpful? What would make it more helpful for future novices?

#### IV. D. Leave of Absence (LOA)

Sometimes a counselee needs a break. Most often, this is for personal illness, but it can be for any number of reasons—unemployment and job hunt, family crisis, and so on. Sometimes the counselee will request a leave, but you also may suggest one if you sense that your counselee is too distracted to participate fully. Please let your AFG know when you think a leave may be advisable.

If the situation is temporary (up to three months), we can simply pause formation, leaving everything in place for them to resume where they left off. If the leave will be longer, the person is officially withdrawn from formation. At that point, you will be asked to write up a summary of the counselee’s progress to that point, similar to thoughts you would gather at a review. Make sure the file is complete and uploaded or mailed to the FG. The FG will inform the counselee they are on official leave, and that they can request reentry any time up to three years. When they come back, after their file is reviewed, they will be assigned to an available counselor or class. In most cases they can pick up formation where they left off.

#### IV. E. Dismissals

Our desire is that dismissals against the will of a counselee should be extremely rare, and are motivated only by a need to protect the mission, health and integrity of the community.

A decision for dismissal comes after much prayer and discussion. A complete review is done by the full formation team. All voices are considered and weighed carefully, including input from the counselee, formation counselor, fellowship, AFG, FG, Chaplain for Formation, and area chaplain. After prayer and discernment, if dismissal still seems the right choice, the Formation Guardian will consult with the Provincial Chaplain before taking action. We are developing an appeal and pastoral care process under the Chaplain for Formation for anyone who feels mistreated by the formation program.

Once the decision has been reached, the Formation Guardian will notify the counselee by telephone or videoconference of the outcome of the review. The notification will include

reasons for the decision, the conditions under which a reapplication might be considered, and, if appropriate, suggestions for alternative vocations. The FG will also notify the Provincial Secretary. All files should be returned to the Formation Guardian, who will keep them for three years. Any electronic files on personal computers should be deleted.

## V. Special Cases

### V. A. Transfers

If the applicant was previously professed in another Religious Order or Christian Community, they fall under the jurisdiction of the Provincial Chaplain, and normally go through a shorter formation period. We call these applicants “transfers” for short. In most cases, the Provincial Chaplain delegates the details of their formation to the formation team and asks to be kept informed of their progress.

At the receipt of the first report, the AFG will declare them a “Transfer” rather than a Postulant. They will be listed in the Directory as a Transfer throughout their formation period. At profession, the designation will be changed to “Professed”.

There is no postulancy period for Transfers. Their formation in the religious life is assumed in whatever Order or Community they were in previously. Formation for transfers typically lasts 12-15 months.

Since transfers went through formation and were professed in another Order, they are already familiar with concepts like Rule of Life, Daily Office, obedience, and other monastic traditions. What they are lacking is the specifically Franciscan charism of TSSF, knowledge of our Principles, and integration into the life of the Order. The precise formation process can be determined based on the needs of the individual transfer. In general, formation will include about three months to develop and experiment with a personal rule of life with a formation counselor, followed by a year of participation in an N1 class.

### V. B. Re-entrants

Sometimes people who were previously professed in TSSF and released from their vows seek to reenter. They, also, are under the jurisdiction of the Provincial Chaplain. Since they have already gone through our formation program, their reentry process is usually even shorter than that of a Transfer, and is focused more on refamiliarization and reintegration into community. The Reentrant is assigned an experienced formation counselor, and the two have leeway to fashion a useful reentry experience, normally of around 6 months.

### V. C. Mental Illness

Sometimes, the formation process brings up old and painful emotional issues for the counselee. This is often a natural and normal result of the introspection expected during formation, and is usually a sign of growth. Some find that the support and guidance of a therapist can help them navigate these rough waters. Therapy can certainly be used in conjunction with formation, as another way of approaching difficult personal issues.

Therapy is not a requirement for formation or profession. It is never appropriate for the counselor to require professional counseling, but there may be occasions where it might be appropriate to suggest it. If you do feel such a suggestion is appropriate for a counselee, do so gently and pastorally. It may be useful if you have a personal experience to share about how seeing a therapist was helpful to you in some personal struggle. Once you have made the suggestion, do not bring it up again unless the counselee asks for more information. The choice of whether to seek help from professionals is strictly the counselee's choice. Your job is to support them in keeping their Rule and living the Franciscan life.

Occasionally, people in formation are suffering from more serious problems, such as clinical depression, bipolar disorder, PTSD, or personality disorders. They may share their diagnosis with you as counselor, or you may just sense that something is terribly wrong, based on their reports or something you hear from the fellowship or other sources.

It is especially important in these times to remember your role. You are a formation counselor. It is not your job to diagnose, or even to decide whether mental illness exists. It is not your job to treat depression or any other disorder. Even if you are qualified as a therapist, this is not the place to exercise those skills. Your only job is to support them in keeping their Rule and living the Franciscan life, and to help discern whether they have a TSSF vocation. Mental illness does not disqualify them from being members of TSSF; in fact, the counselee's experience of illness may lead to special gifts which contribute to the Order. Some of St. Francis' early followers may well have been labeled "mentally ill" by today's standards.

Be alert to the same problem areas as you would with any other counselee. If their illness prevents them from doing the Daily Office, or maintaining a personal prayer practice, or facing the self-exploration required for reconciliation, those are the behaviors that need addressing, rather than the illness. Disruption of the fellowship or clearly dysfunctional personal relationships with other tertiaries raises the necessity of protecting members of our community from harm.

As with any other counselee, do keep your AFG informed of any concerns as they arise, and follow their guidance and direction as you counsel the individual. The AFG may decide to do a file review to get a better understanding of the larger picture. In some cases, the AFG may decide, after consulting with the FG, that it would be appropriate to ask the person to take a leave of absence to deal with their issues before reapplying to the Order. Allowing time off to work on personal recovery, rather than "powering through" challenging times, may lead to much healthier and happier outcomes in the long run. It is important at such a time to engage the Chaplain for Formation to provide pastoral care.

## V. D. Addictions

A number of people in TSSF, both in formation and Professed, are in recovery from alcoholism or other substance abuse with the help of Twelve Step programs. There is no conflict between Twelve Step programs and TSSF formation. Rather, many of the same principles are present in both contexts. Like TSSF formation, Twelve Step programs encourage self-awareness and self-

examination, the support of a community, and spiritual growth, and can be a valuable adjunct to the formation process. We do ask, however, that people who are new in recovery wait until they have at least a year clean and sober before attempting to enter formation in order to fully focus their efforts on their recovery process.

If your counselee is active in a Twelve Step program, remember that you do not have to be an expert in addictions or Twelve Step recovery. You are not serving as their Twelve Step sponsor, or guiding them through the steps. Your job is to support them in keeping their Rule and living the Franciscan life, and to help discern whether they have a TSSF vocation. If you happen to have a background in Twelve Step recovery yourself, you will have perhaps a better understanding of their personal journey. Just try not to allow their recovery process to dominate the formation discussions. Stay focused on your role.

If you are not familiar with the Twelve Steps, you are encouraged to read through them, as they will be an important part of your counselee's life. The Steps are available many places on the web. Regular attendance at Twelve Step meetings and meetings with their sponsor should be encouraged as part of both their recovery and their spiritual well-being. Both of these may be included in their Rule of Life if they choose.

The Fifth Step "Admitted to God, to ourselves, and to another human being the exact nature of our wrongs," looks a lot like our TSSF requirement for annual sacrament of reconciliation. Some people try to put an annual Fifth Step in their Rules in lieu of annual confession. This can be an acceptable alternative, but you should work with your counselee to ensure that their Fifth Step includes key elements of sacramental reconciliation beyond admitting wrong: repentance, intention of amendment of life, and absolution or assurance of God's forgiveness.

## V. E. Incarcerated

While it is not possible to admit a person to formation in the Third Order who is currently incarcerated, any such person who makes inquiry to us will be directed to the Perugian Fellowship in order to foster their connection with Francis.

## Appendix A: Complete Formation Process

Inquirer Stage
<ul style="list-style-type: none"> <li>• Inquirer contacts the Secretary for Inquirers. The Secretary asks for mail, email and phone, and mails welcome materials, which include the Application to Enter Formation, a summary of our Principles, and general information about TSSF.</li> <li>• The Secretary sends the Inquirer’s contact information to the AFG for Welcome (AFGW).</li> <li>• The AFGW contacts the Inquirer to welcome them and invite them to a Zoom information session or telephone conversation.</li> <li>• The Inquirer completes the Application to Enter Formation and submits it to the FG. The Inquirer is now considered an Aspirant.</li> </ul>
Aspirancy Stage
<ul style="list-style-type: none"> <li>• The FG sends the Aspirant instructions to complete and return to the FG an autobiography, reference letter, and consent to Safe Community policy. Files are maintained online and shared with the AFGW.</li> <li>• The AFGW works with the Aspirant to complete the above materials, help obtain a spiritual director if needed, and participate with a fellowship.</li> <li>• When a spiritual director is obtained, the Aspirant provides SD contact information to the FG, who sends a letter of introduction, our <i>Guide for Spiritual Directors</i> and <i>The Principles</i>.</li> <li>• The AFGW provides resources (readings, including <i>Forming the Life Introduction</i>, videos, etc.) to help the Aspirant begin to learn basic information about Franciscanism and our Order. The AFGW may host online sessions to share and discuss these materials with Aspirants.</li> <li>• When the Aspirant and AFGW feel ready and there is a Postulant Counselor vacancy, the AFGW convenes a Zoom conversation (Postulant review) with the Aspirant, FG, AFGP, and Postulant Counselor. The team determines admission to postulancy. The AFGW collects or summarizes relevant notes from the Postulant review and uploads to the file.</li> <li>• If there is no counselor vacancy, the Aspirant is held on a waiting list. The AFGW maintains periodic contact with the Aspirant until the Postulant review can be scheduled.</li> </ul>
Postulancy
<ul style="list-style-type: none"> <li>• Following the Postulant review, the AFGP announces postulancy to designated leaders of the Order via email. The Provincial Chaplain assigns an area chaplain to the Postulant. The Provincial Secretary enters the Postulant into the TSSF database and publishes the information in <i>Hot News</i>. The Literature Coordinator sends the new Postulant “The Basics” package, which includes the <i>Devotional Companion</i>, the Directory and Intercession List, and other documents.</li> <li>• The AFGP sends the new Postulant the service “Welcoming and Receiving of a Postulant into TSSF” to be used in the fellowship.</li> </ul>

- After three months of postulancy, the AFGP checks in with the Postulant to confirm that “The Basics” have been received, and to ask whether the counselor relationship is satisfactory.
- The Postulant works with the Postulant Counselor and AFGP (as needed) over six months to develop a personal rule, focusing especially on daily/weekly foundational spiritual disciplines. Reporting should occur at least monthly, and may take the form of written reports and/or conversations.
- The Postulant completes any required Safeguarding training during this period.
- Study during Postulancy includes: *Forming the Life* section I, chapters 1 – 13; and selections from a reading/video list that covers basic Franciscan history and values and the history of our Order
- Around the beginning of the sixth month of postulancy, the AFGP convenes a Zoom conversation (Novice review) with the Postulant, Postulant Counselor, AFGN1, Novice Counselor, and if Postulant would like, area chaplain and fellowship representative, who otherwise are consulted separately for input. The team determines admission to Novitiate. If agreed, the AFGP issues a Novice permission form, approves the personal rule of life, and gives instructions for the Novicing Service. The AFGP collects or summarizes relevant notes from the Novice review and uploads to the file.

#### Novice 1

- The norm during Novice 1 is monthly participation in a group forum, with quarterly written reports to the Forum Mentors. Novices unable to participate in a forum will cover the same material in monthly reports or conversations with a Novice Counselor.
- The study focus includes deep reflection on the Principles, Franciscan history and theology (especially Third Order history), and integrating this tradition into daily life. Readings include *Forming the Life*, section II, chapters 14-23 and other resources on history and theology.
- In preparation for the mid-Novice review, the Novice is encouraged to further develop the personal rule to integrate learning during the year.
- Around the beginning of the twelfth month, the AFGN1 convenes a Zoom conversation (mid-Novice review) with the Novice, AFGN2, Novice 1 counselor, Novice 2 counselor, and if Novice would like, area chaplain and fellowship representative, who otherwise are consulted separately for input. The team determines progression to N2. The AFGN1 approves any changes to the personal rule. The AFGN1 collects or summarizes relevant notes from the mid-Novice review and uploads to the file.

#### Novice 2

- The norm during Novice 2 is reporting to a Novice Counselor every other month, and participating with an online service formation group (lead by mentors) in the intervening months. Novices unable to participate in the service formation group will interact with their Novice Counselor or other mentor in those months.
- The focus during N2 is embodiment of the Franciscan charism in daily life, especially the three Ways of Service (prayer, study, work). During this time, missional priorities of the Order are explored, including sacred ecology and racial harmony. The Novice identifies at least one form of Service to experience in depth.
- Study includes *Forming the Life*, section III, chapters 24-26, and IV, chapters 27-29.

- With the agreement of the formation team, the Novice 2 may adopt a Principles-based rule, working with a chaplaincy mentor. The AFGN2 approves the rule.
- Around the eleventh month, the AFGN2 convenes a Zoom conversation with the Novice, FG, Novice Counselor, Service Formation Group Mentor, and if Novice would like, area chaplain and fellowship representative, who otherwise are consulted separately for input. The AFGN2 approves changes to the rule. The team makes a recommendation concerning profession. The AFGN2 collects or summarizes relevant notes from the Profession review and forwards them to the FG. The FG finalizes the notes, shares them with the candidate and, assuming a positive recommendation, sends the candidate a copy of *Guidelines for a Retreat in Preparation for Profession to TSSF* and asks the Novice to read *Forming the Life*, Section IV, Chapter 30. The FG compiles any further recommendations and presents the profession ballot to Chapter in the twelfth month. The ballot includes: Novice's Request for Profession with reflections; summary evaluation from the formation team, including confirmation of financial contribution; input from the Fellowship; and a photo if possible.

#### Profession

- Chapter votes on the candidate.
- If the Novice is elected to profession, the FG notifies the Novice as soon as possible. The Provincial Chaplain sends the Mandate for Profession, a Profession Cross, and instructions for reporting to their area chaplain after profession. The approved candidate arranges the profession ceremony with their fellowship.
- After the profession ceremony, the newly Professed is instructed to send a copy of the completed Mandate for Profession to the Provincial Secretary, who then records and publishes the profession date. The newly professed person keeps the original.
- After the profession vote, the formation counselor brings closure to the counseling relationship and sends hard copies of any remaining reports to the FG. The FG destroys all formation materials accumulated during the years of formation pertaining to the individual. All members of the newly Professed's formation team erase all correspondence and records from their computers and destroy any remaining hard copies.

#### Re-entrant Track

- A previously professed member of TSSF is considered a Re-entrant and has a shortened formation experience under the direct discretion of the Provincial Chaplain. Normally, the following procedures will apply:
- A Re-entrant is referred to the Provincial Chaplain, who initiates a telephone conversation to discuss the reasons for leaving and the desire to return. If the Chaplain determines that re-entry is appropriate, the Re-entrant is referred to the FG.
- The FG asks the Re-entrant to complete and return the Application to Enter Formation, along with an autobiography and consent to the Safe Community policy.
- Upon receipt of the application, the FG helps the Re-entrant join a fellowship and assigns the Re-entrant to an experienced formation counselor. The counselor and Re-entrant are given general directions to explore re-entry in a process of refamiliarization and reintegration (typically of about six months).
- As soon as the FG approves the personal rule, the FG announces the Re-entrant to designated leaders in the Order. The Provincial Chaplain assigns an area chaplain to the Re-entrant. The Provincial Secretary enters the Re-entrant into the TSSF database

and publishes the information in *Hot News*. The Literature Coordinator sends the Re-entrant “The Basics” package, which includes the *Devotional Companion*, the Directory and Intercession List, and other documents.

- The FG sends the Re-entrant the service “Welcoming and Receiving of a Re-entrant into TSSF” to be used in the fellowship.
- After three months of re-entry exploration, the FG checks in with the Re-entrant to confirm that “The Basics” have been received, and to ask whether the counselor relationship is satisfactory.
- When the counselor and Re-entrant feel ready, the FG convenes a profession review with the formation counselor and if Re-entrant would like, area chaplain and fellowship representative, who otherwise are consulted separately for input. The team makes a recommendation which the FG presents to Chapter regarding the vote on profession.

#### Transfer Track

- If the Applicant was previously professed in another Order, they fall under the direct discretion of the Provincial Chaplain, and normally go through a shorter formation period. In most cases, the Provincial Chaplain delegates the details of their formation back to the formation team and asks to be kept informed of their progress.
- The process is the same as other candidates through the Aspirancy stage.
- In place of a Postulant review, a Transfer review is convened. Typically, the Transfer is assigned to a formation counselor for a shortened period to develop a personal rule of life, and then enter an N1 class.
- When the Transfer and counselor feel ready, and a class vacancy occurs, the Transfer enters a Novice 1 class (or is assigned to a Novice 1 counselor) for a period of one year. The Transfer is not considered a Postulant or Novice and is not subject to statutory time requirements for Postulants or Novices.
- After about 11 months in a Novice 1 class, the Transfer requests a Profession review. The AFGN1 convenes a Zoom conversation with the Transfer, FG, Novice Counselor, and if Transfer would like, area chaplain and fellowship representative, who otherwise are consulted separately for input. The AFGN1 approves changes to the rule. The team makes a recommendation concerning profession. The AFGN1 collects or summarizes relevant notes from the Profession review and forwards them to the FG. The FG finalizes the profession ballot and presents it to Chapter in the twelfth month. If profession is approved, the FG ensures that all formation files are destroyed.
- The Transfer may opt to experience the full 2.5 year formation program. This determination should be made at the Transfer review.

## **Appendix B: Formation Report Forms**

Please check with your AFG for the latest version of these forms. Current forms include:

- Postulant Report Form, Months 1-3
- Postulant Report Form, Months 4-6
- Oral Report Form
- N-1 Formation Report Form
- N-2 Formation Report Form

## Appendix C: Quarterly Report Form

### *TSSF Counselor to AFG Quarterly Report Form*

*(Counselor fills out separate form for each counselee  
and sends to AFG the first day of each quarter)*

- Today's Date:
- Counselor Name:
- Counselee Name:
- Any changes to contact info for counselee? If so, please provide new contact info here:
  
- New SD? If so, please provide contact information here:
  
  
- Last Report # (P or N):
- Date of last report:
- Issues / Problems / Growth Areas / Progress:
  
  
- Any reviews or other action due in the coming quarter?
  
  
- Willing to take another counselee? \_\_\_\_\_

## **Appendix D: Resources for Enriching the Postulant Rule**

- Postulancy Welcome Letter
- Postulant Counselor's Guide to Basic Rule Requirements
- Rule of Life Instructions for Postulants
- Rule Samples

## Postulancy Welcome Letter

Dear Postulant,

Welcome to postulancy in the Third Order, Society of Saint Francis. During this part of the formation process you will be focusing on developing your own Rule of Life. This rule will guide you as you live out your call to follow St. Francis.

You will be spending the first three months of postulancy drafting a personal rule of life. We encourage you during this time to work closely with your spiritual director as well as being in regular communication with your formation counselor. During the second half you will live your life in accordance with that rule and make any changes that are needed.

Having and following a rule of life may sound intimidating at the beginning, but the truth is that as a Christian you have made vows concerning how you would live your life at baptism and/or confirmation. In the Episcopal Church the Baptismal Covenant from the Book of Common Prayer is included in all services of baptism and assented to by those being baptized. If you were baptized as a small child the vows were taken for you by your parents and God-parents and you reaffirmed them as your own at confirmation. We are reminded of these vows and invited to reaffirm them at services of baptism and certain baptismal feast of the church.

We suggest you begin your journey of developing a personal rule by reviewing the vows you have already made. Take time during your first week to slowly read the Baptismal Covenant, or the vows used in your church, out loud if possible, and reflect upon what you have promised and how you are currently living out these promises.

Our first vow invites us to community through fellowship, the Eucharist and something referred to as the prayers. The earliest monastic communities began the tradition of gathering several times a day to read scripture and pray together. This became the daily office that St. Francis specifically called for his followers to pray. We, as third order Franciscans, rarely have opportunities to recite the office together, but we each commit to saying either Morning or Evening Prayer every day in solidarity with the rest of our community. These services can be found in the Book of Common Prayer.

Now that you are part of our community, we expect you to engage in either Morning or Evening Prayer every day. There are many different formats that you can use, but they all include reading from the psalms, reading from Holy Scripture, canticles, the Lord's Prayer, collects (prayers) and a closing blessing.

In addition to the BCP you can find Daily Offices in prayer books from other parts of the Anglican Communion and on apps such as eBCP that you can download. There are also several online resources such as Mission St. Clare that provide the complete service each day. Feel free to try out different formats to see what is most comfortable for you.

It is anticipated that you will spend about six months as a postulant. Here is an outline of what you will be doing:

- Week one – Begin doing Morning or Evening prayer every day. Reflect on the vows you have already made and begin exploring how to incorporate living those vows into your daily life.
- Month one (after first week) – Read from *Forming the Life*: Section I, Chapters 1, 4, 3 and 11.

- Reflect on each of these chapters and respond to one of the questions at the end of each. You can respond with a paragraph, notes, a drawing, a poem, a song or a dictated response.
  - You should also be considering how the material you are reading might fit into your eventual rule of life, that is, what do you hear God calling you to incorporate into your life to help you become the person God longs for you to be.
- Month two – Read from *Forming the Life*: Section I, Chapters 2, 12, 10 and 13.
- Continue to reflect on and respond to one of the questions at the end of each chapter.
- Month three – Read from *Forming the Life*: Section 1, Chapters 5,6, 7, 8, and 9.
- Continue to reflect on and respond to one of the questions at the end of each chapter. By this time the outline for your rule of life should be emerging. Working with your spiritual director and formation counselor, put together a draft rule of life. Use the “Rule of Life Instructions for Postulants” to make sure you have included all required elements of the personal rule.
- Months four, five and six – Learn more about what it means to be a Franciscan by reading about the lives of Francis, Clare and other Franciscan Saints, studying Franciscan theology, and exploring multimedia resources. A bibliography will be made available.
- During this time, live your rule and reflect upon how it is working for you. What feels comfortable, what parts of it are difficult, what is missing, what needs to be changed? After at least three months, when you and your formation counselor are comfortable with your rule, it will be submitted to an Assistant Formation Guardian for approval.

Your formation counselor will have other resources to help you, if you would like them. These include a collection of Guiding Questions to help you consider each of the 9 points in the personal rule, and a collection of sample rule elements. The desire of the formation team is to help, so please don't hesitate to ask your formation counselor or assistant formation guardian when you have questions or concerns.

Postulancy Welcome LetterAppendix  
Baptismal Covenant

*Celebrant* Will you continue in the apostles' teaching and fellowship, in the breaking of the bread, and in the prayers?

*People* I will, with God's help.

*Celebrant* Will you persevere in resisting evil, and, whenever you fall into sin, repent and return to the Lord?

*People* I will, with God's help.

*Celebrant* Will you proclaim by word and example the Good News of God in Christ?

*People* I will, with God's help.

*Celebrant* Will you seek and serve Christ in all persons, loving your neighbor as yourself?

*People* I will, with God's help.

*Celebrant* Will you strive for justice and peace among all people, and respect the dignity of every human being?

*People* I will, with God's help.

## Postulant Counselor's Guide for Basic Rule Requirements

A ROL is a statement of how one intends to live one's life. It is a set of desired behaviors, attitudes and practices the counselee commits to. Some items may be more broadly philosophical, but some commitments should be concrete, specific, and measurable. The rule should stretch them a bit, but not be onerous or burdensome. Classic guidance is to weight the rule by thirds: one-third commitments that are relatively easy and routine; one-third commitments that one can do, but including them in the rule provides the extra nudge to actually do them; and one-third that are a challenge or growing edge. The rule should reflect what is important to your counselee in their own journey and circumstances, not an abstract notion of what a “serious Christian” or “real Franciscan” should do.

First-draft rules will often include generalizations, like “I will love God with my whole heart and mind and soul...” This is a worthy ideal. It just needs to be brought down to earth a bit. How will that translate into a behavior or attitude your counselee can regularly cultivate? What will they *do* to demonstrate that love?

Some Aspirants include wordy descriptions in their first drafts – about what they used to do, or opportunities they hope will materialize, what they enjoy, or their theology or philosophy. That seems to be a natural part of the process, and the background context is often useful for both of you in the first draft. Thank them for sharing, say how helpful this information is as background, and then help them understand that a rule is normally stated in simple, declarative sentences of intention: “I will...”

Some people like to include an introduction or conclusion to help them remember the rationale behind their commitments, or intersperse their rule with prayers or Bible verses. This is fine, unless the elaborations distract from the main content of the rule. On a practical note, the rule should be a document that is referenced frequently, especially at the beginning for formation, so it is helpful to keep it two pages or shorter so that it can be reviewed easily and printed back and front on a single sheet of paper.

The following sections address the required elements in each of the 9 points of the rule. Your expertise will be helpful in keeping simple requirements simple, while encouraging prayerful, creative and workable thinking beyond these basic requirements.

**Eucharist.** Required is “Sundays and major feast days”. What we mean by “major feast days” is the list on page 15 of the BCP. The counselee doesn't have to list those feast days in their rule, but they can if they like. You should discourage specific details as to time, place, or responsibilities (priest, deacon, assistant...); the rule should be flexible enough to allow for vacations or changing circumstances.

**Penitence.** Required are (a) daily self-examination, and (b) annual sacrament of reconciliation.

Penitence in the Franciscan tradition can also be thought of as metanoia, a constant turning or returning to God. So this section is not about “hair-shirt” stuff. Instead, it is about keeping mindful of what draws us towards God, such as gratitude and humility; how we might lose sight

of God during our day; and what helps us return to God.

Self-examination is often a new practice for Postulants. Unless your Postulant really needs to describe how they do this in detail in the rule, it is better to leave the format open and flexible, so they can try out different ways of doing this activity. The same may be true about specifying the time of day; unless they need that specificity, the rule should allow for flexibility.

For the sacrament of reconciliation, your Postulant may specify Advent or Lent, but this is not necessary. Other specifics, like the name of the confessor, should be left out to allow flexibility. Confession does not have to be made to a priest. Lay people can serve as confessors, using a “declaration of forgiveness” in lieu of absolution. The rite in the BCP does not have to be used; a more informal “holy conversation” or other method may be used.

**Personal Prayer.** Especially for people without a well-established daily prayer practice, a specific commitment in terms of minutes per day may be helpful in growing their practice. It should be realistic, whatever they think they can maintain over time. If they are just beginning a daily prayer practice, ten or fifteen minutes a day, or even five, is fine. As the habit gets established, you might encourage them to increase their commitment, recognizing that we each have different temperaments and life situations.

You may encourage Postulants to experiment with many different forms of prayer – meditation on scriptures, rosary, centering prayer, “conversational” prayer, sitting in silence, praying the news, intercession, thanksgiving, and more. They may list in their Rule some of the prayer forms they intend to use, but they should also leave room for the Spirit to move.

Sometimes Postulants want to pray while walking or jogging or doing some other activity. In such situations, you may want to explore how this works for your counselee and encourage them to also try some of the variety of prayer methods noted in the previous paragraph.

Many new Postulants confuse the Daily Office with personal prayer. Personal prayer is daily, dedicated, mostly unscripted time alone with God. The Daily Office, along with the Community Obedience, are considered as communal prayer that binds tertiaries to one another in our dispersion, and to the larger community of saints throughout history. So the Daily Office is included under Obedience, not in this Personal Prayer section.

**Self-Denial.** This is a difficult topic for many of us, and easily misunderstood. In this culture, many of us (especially women) are taught to be self-effacing and self-deprecating, to always sacrifice our own good for the sake of the other, the implication being that everybody else is more important and valuable than we are. That's not what this is about. It's also not about self-punishment, or intentionally bringing additional suffering to ourselves, or somehow proving our worth to God by enduring discomfort or deprivation.

Some people include fasting in this section. Fasting can be a profound and meaningful exercise. It has a long and honored history, not just in Christianity but in many other traditions as well. If fasting is valuable for your counselee, it is good to include it, but it is not required. But if your counselee understands self-denial as a superficial “giving up chocolate for Lent,” you need to

help deepen that understanding.

An alternative phrase to use for self-denial is self-emptying. It is about identifying those “idols” in your life—those attitudes, possessions or activities that stand between you and God—and beginning to root them out. These impediments may be addictions of various kinds; unhelpful mental or emotional attitudes like being over-controlling or anxious; or being tied too much to possessions, achievements or status. Specific ways to counter those idols, like exercise or diet programs, therapy, or practices of gratitude could go under Self-Denial.

On a practical note, if your counselee includes many intentions in this section, you might ask them to pick out the two or three most important ones and save the rest for a future time. Sometimes it helps to remind them that they will need to report on every item in their rule every month.

This section is sometimes where conversation can allow you to help your counselee set more helpful detail in their rule. For example, if you encounter the overly general, “I will get out of debt,” you can ask about what specific steps are needed to address the debt, so that the counselee can commit to contacting their creditors to make arrangements, or attending Debtors Anonymous meetings, or something else.

Sometimes you may encounter something that seems extreme, such as “I will eat only for survival, never for pleasure,” or “I will give away two possessions for every purchase I make.” Such commitments are unrealistic and could turn every grocery trip into a logistical nightmare. You might explore what is at the root of such goals (eating disorder, hoarder tendencies, or just over-enthusiasm to have a “good” rule?). Then you might imagine with your counselee just how their intention might play out, or ask them to try it for a week and see if they can really do what they intend. In this way you can help them hone their desire in more workable ways.

As always, please contact your AFG if another set of eyes and ears would be helpful to you.

**Retreat.** The ROL should specify at least one annual retreat of 24 hours of silence. If their fellowship does annual retreats, they can add “with other tertiaries if possible”, or some equivalent to that. The “if possible” is important, in case the fellowship doesn't do a retreat one year, or if they have a scheduling conflict and cannot attend.

They may include other retreats, such as with their parish or diocese, but they should not list specific dates, topics or locations so they don't have to update their rules with every schedule change.

**Study.** The Rule should mention study of the Bible, Franciscan spirituality and values, and monthly reading of formation materials. They might include EFM study, or other courses or groups they are involved in. Again, they should stay away from listing specifics that could change quickly.

Some people don't read much, which is fine. You can encourage them to attend classes in their parish, and select shorter works and videos from the Formation Bibliography. It's also okay, and

encouraged, to include other activities, like going to museums, nature walks, or listening to podcasts or recorded books on a broad range of topics (not necessarily “religious”). As Franciscans, we treasure all of Creation as God’s revelation.

**Simplicity.** This category is an area where growth may be gradual. It is important to think of varieties of Simplicity—regarding possessions, time, and inner simplicity. Often in early rules, the entries are about cleaning out closets and garages. That can be a good starting place, but over time you will want to help your counselee delve deeper, reflecting on our Principles and other study material. For those who already live simple lives, they can include their current practice, or focus on ways they have not considered about Simplicity before.

**Work.** The Rule can include both day job and outside volunteer ministries. Sometime people with secular jobs do not include anything about that work in this section; if that happens, you should explore why. Sometimes, people feel like they should not include work that does not seem overtly like “ministry”—churchy or charitable. Challenge that thinking. Our vocation as Christians and Franciscans encompasses all our lives; we cannot compartmentalize. A valuable outcome of the formation experience could be a richer understanding of even the most mundane work as ministry.

According to our Principles, we view Work, along with Prayer and Study, as the ways we serve the world to achieve our Aims (to make our Lord known and loved, to spread the spirit of love and harmony, and the live simply). In our diverse workplaces, overt proselytizing may be unwelcome or prohibited. So your job is to help your counselee understand how their interactions with coworkers or customers every day can make Christ known, or spread love and harmony, or simplify a complex world. The same is true for church or volunteer work.

As with other sections, you will want to help your counselee develop specific intentions, not generalized statements. Also, make sure this section is realistic and balanced, and not an example of overwork or complexity.

**Obedience.** This section is usually a listing of required elements, although your counselee is free to add additional items. Some people have a visceral dislike of the word, “obedience.” In exploring that with them, you might offer the alternative phrase of “commitment.” What this section deals with is the ways in which we commit to support one another in loving community.

The required elements are:

- Daily office. This can be Morning or Evening Prayer, and if they say Daily Office they have flexibility to do either. If the specific commitment to one or the other helps them, it’s okay to specify. We understand this practice as a form of communal praying that transcends our physical separation, and unites us to the larger community of saints.
- Community Obedience daily, either in conjunction with the office or separately. This is another way we pray for and with one another every day.
- Spiritual direction, ideally monthly, minimum quarterly.

- Yearly renewal of vows, once Noviced.
- Regular reporting to formation counselor and participation in classes or groups.
- Regular participation with online or local fellowship meetings, and regional and provincial convocations as circumstances permit.
- Annual contribution to TSSF.
- Obedience to Constitution and Provincial Statutes of the TSSF.



## **The Third Order, The Society of Saint Francis, Province of the Americas Formation Program**

### **WRITING YOUR PERSONAL RULE OF LIFE – INSTRUCTIONS FOR POSTULANTS**

Below are the elements found in the TSSF personal rule—a form on which to pattern your life so that it is spiritually based, communal, and balanced. This is a guide for writing your own rule; add to this general rule the circumstances fitting your life. Your personal rule should fit YOU and your lifestyle. Make it something that stretches you to grow but is not too challenging to keep. The Third Order religious life is not separate from our day-to-day lives—that day-to-day world of the home and the marketplace is exactly where we are called to live out our vocation!

Your rule should state your specific intentions about how you will observe each category of the Rule. Remember, too, that this rule is designed to help us live our Principles. Consider, for example, that the Prayer, Study and Work elements of our rule are the avenues through which we further the Aims of our Order. Self-denial is one way we realize our Object.

Keep your rule simple and direct. Most rules are 1-2 pages in length; longer than that becomes too cumbersome for daily reference. Strive for a balance of prayer, work and study. Let your rule reflect your own life and interests, not a romantic ideal. Try to make it attainable and challenging so that it encourages growth but not guilt. What you choose to express in your rule now will change over time. There is one basic Rule for all, but each must tailor an individual response to each category based on his/her own life circumstances and way of knowing.

The Rule is a framework on which to build a Franciscan life in Christ. Francis was totally committed to living the Gospel in a radical way. The Gospel itself is the true Franciscan Rule; our individual rule expresses how we intend to live the Gospel in our own circumstances.

Be specific when writing your rule about what you intend to do to integrate the nine categories listed below into your everyday life. Those areas *in bold italic* are required and may simply be copied into your rule as given below. Otherwise you may personalize according to the explanation. Do not hesitate to ask for help from the Formation Guardian, your AFG, spiritual director, or other professed TSSF members.

- **Eucharist.** *Attend on Sundays and major feast days.* These include Christmas, Easter, Ascension Day, Pentecost, Trinity Sunday, and All Saints Day, if available in your area.
- **Penitence** should include *daily self-examination, and private confession or reconciliation at least once a year.* Your self-examen may be included in your daily personal prayer time. Daily

self-examination and personal prayer may be times to open yourself to our Notes of humility, love and joy (Days 21-30).

- **Personal Prayer.** *State how much time you plan to spend in personal prayer each day.* (This does not include the Daily Office found under 9, Obedience.) Try to schedule a regular time each day when you can sit down undisturbed and spend time with God. Your personal prayer can include a variety of different ways of praying, such as meditation, thanksgiving, intercession, and reflection on Scripture. Make this a priority in your rule. Days 14-16 of the Principles can help you with this section.
- **Self-Denial.** Please describe specifically what *you* pledge to do. Self-denial can be thought of as rooting out anything that stands between us and following Jesus more closely. You may first meditate on the Object (Days 1-4) from our Principles in fashioning this part of your rule. Describe concrete practices that might help you to eliminate selfishness, pride, control, or any other impulses that negatively affect your relationship with God, others, and self. What creative and personal ways might help you break down barriers to wholeness—to love God with all your heart and soul and mind, and to love others as yourself? Think of it as learning to love, and growing whole in Christ.
- **Retreat.** Include *at least a night and a day spent primarily in silence*, preferably with other Tertiaries, *annually*. We need quiet time to listen to God, away from distractions, to feed and sustain us on The Way. If organized retreats aren't available to you, home retreats are possible. "Quiet days" do not normally meet the retreat requirement, so if an overnight commitment will be difficult for you, consult with the formation team about acceptable alternatives.
- **Study.** Your study must include *Bible study and/or meditation on Scripture; study of Franciscan spirituality/history/values; and study of our formation materials, including assigned reading from Forming the Life of a Franciscan and participation in formation groups and classes during novitiate.* You may also add other study on a broad range of subjects. As you develop this section, you can refer to Day 18 of the Principles for further focuses of study.
- **Simplicity.** Please describe concrete ways you intend to express Franciscan simplicity in your life. As Self-Denial deals with behavior and spiritual values, this category deals with material values and possessions. Simplicity includes stewardship of time, material resources and talents. It is you for whom this rule is written, not for your family. We aim to practice "Gospel values" rather than "world values" in whatever circumstances we find ourselves. Days 10-12 of our Principles can help you with this section.
- **Work.** Please describe specifically what *you* pledge to do. If you are employed, this area should include your everyday work, as well as other areas of ministry. How can your work help you further the three Aims of the Order (see particularly Days 5-9)? The traditional Franciscan focus addresses issues of peace, social justice, poverty, and creation. We are interested in your being a Franciscan witness in the workplace even though you may develop a specific ministry beyond your "day job." Each of us has unique gifts, and as we discover these, we can put them into God's service. How do you bring Franciscan life and values to your daily vocation as employee, spouse, parent, volunteer, minister, etc.? Days 19-20 of the Principles may also help you with this section.
- **Obedience** addresses commitment to community, and must include the following points:

- ***Praying the Daily Office (Morning or Evening Prayer) each day*** as a communal praying we share in our dispersed lives.
- ***Praying the Community Obedience daily.*** This short series of prayers and readings includes the day's Principle, the intercessions for the day from the Directory and Intercessions list, and a collect.
- ***Meeting regularly with spiritual director*** (monthly is recommended during formation).
- ***Yearly renewal of pledge,*** once Noviced.
- ***Regular reporting to formation counselor:*** monthly during postulancy; may be less frequent during novitiate.
- ***Attending fellowship meetings and provincial convocations*** as circumstances permit.
- ***Contributing annually to TSSF.***
- ***Complying with TSSF Constitution and Provincial Statutes*** (you will receive these when you become a Postulant).

## **Rule of Life Samples**

Note to Postulant Counselor: If your counselee is having trouble fashioning a particular part of their rule, it may be appropriate to share examples. Please cut and paste the sections from this compilation that you think may be helpful. Please do not forward this whole document to the counselee, as we want to avoid a smorgasbord mentality which may overwhelm the Postulant with choices, rather than providing some carefully considered food for thought.

### **Heading**

(Some choose to make a statement at the beginning concerning their rule)

To let myself be reshaped into God's loving image and strive towards the kingdom of God.

### **1 – Holy Eucharist**

I will participate in the celebration of the Eucharist each Sunday (or Saturday evening) and major feast day and seek out opportunities to attend week-day Eucharists.

I shall attend Eucharist each week and on major feast days at St. ....

When available again, take the Eucharist weekly and as opportunities present.

I will participate in the Eucharist every Sunday and on greater feasts. As I participate in the Eucharist I will express deep gratitude for my desire to enter into God's love and its expressions of creativity, compassion, wholeness and freedom.

attend Eucharist

- each Sunday

- major Feast days when offered by near-by churches

I will attend the Eucharist on Sundays and on Christmas, as well as on Epiphany, Ascension, and All Saints Day if available. I will also aspire to remember the sacramental aspect of all eating and drinking.

### **2 - Penitence**

When I perceive emotional or spiritual disquiet, I will turn my heart towards God.

Each day I will include in my prayers an examination of consciousness to ponder with God the meaning of daily incidents and to ask for grace in dealing with them.

At least once per year, I will participate in the Rite of Reconciliation.

Each evening I will take time to engage in examen of consciousness to discern when during the day I have been aware of God's presence, seen myself and others as beloved by God and listened for God's call and when I have failed to do so.

I will seek out the sacrament of reconciliation whenever I feel called to do so with the intention of receiving the sacrament at least once a year.

I shall humbly acknowledge my faults to God through evening self-examen and annual Reconciliation at Christmas, Easter and Pentecost.

Learn from regular spiritual direction.

Bring to God promptly the things I do wrong, accepting forgiveness, forgiving others promptly, believing in transformation of myself and others.

Ask others for forgiveness when I have hurt them, and make amends where possible.

Seek help through the sacrament of reconciliation.

practice Penitence

- daily self-examination

- yearly sacrament

I will participate in sacramental reconciliation at least once a year, either with my spiritual director or another priest.

I will take time each day for self-examination, using the lens of Humility, Love, and Joy, and will also strive to notice my unwholesome thoughts and actions as they occur, and promptly make amends.

### **3 - Personal Prayer**

Pray without ceasing by being constantly aware of God's presence in me, in others, in all.

Enjoy to the full, with gratitude, the life God gives me.

Seek and trust God's guidance when I serve others.

Set time aside each day for prayer and meditation.

Seize opportunities to pray and meditate with others.

Intercede for others. Ask for God's blessings and redemption for those I consider are leading badly.

I will set aside at least 30 minutes each day to share with and listen to God through meditative prayer and holy reading. In these prayers or during the Daily Office, I will bring intercessions, praise and thanksgivings before God.

I will take at least 25 minutes at the beginning of each day for personal prayer.

As a meditation I will pray at least four rounds of prayers on beads each day.

I will maintain a daily practice of gratitude, and will keep a prayer list for daily intercessory prayer.

In addition, I will take whatever opportunities I can for other kinds of prayer, so my life can be a conversation with God.

Throughout each day, I will give thanks for the goodness God has planted in and all around me.

I shall spend twenty minutes each day in contemplative prayer.

Before meals, I shall reverently give thanks in prayer and bring to awareness things I am grateful for in the moment.

Each day I shall follow a modified St. Francis Rule for Hermitages at the .... Hermitage to include praying the Daily Office three times and honoring silence until midday prayer. Fridays and Saturdays shall be set aside for extended solitude.

I shall seek solitude on Fridays at the .... Hermitage for sustained contemplation according to St. Francis' Rule of Hermitages.

practice Personal Prayer for 30 minutes a day including  
meditation  
thanksgiving  
intercession  
silence  
walking

I will engage in a form of silent, listening prayer for at least 20 minutes each morning.

Each evening, before bed, I will express my thanksgiving to God for the blessings of the day by recording my thanks in my journal and/or verbally as the last thing before I go to sleep.

I shall spend twenty minutes each day in both centering prayer and nature contemplation.

Before meals, I shall reverently give thanks in prayer and bring to awareness things I am grateful for in the moment.

Each day I will engage in at least three periods of prayer. One involving a form of silent, listening prayer, such as Centering Prayer. The second praying a form of the Daily Office. A third which may involve attending a Eucharist, engaging in Lectio, sitting for a second session of silent prayer, praying another part of the Daily Office or some other form of prayer.

#### **4 - Self Denial**

I shall partake in a special fast during Advent and Lent.

A quarter of my annual income shall be given to charity.

I shall maintain a final will to direct monies to provide for those most in need after my departure from this life.

I shall not possess, threaten with, or use lethal weapons against anybody. My commitment to nonviolence includes the avoidance of words and actions that are intended to harm.

I shall partake in a special fast during Advent and Lent.

A quarter of my annual income shall be given to charity.

I shall maintain a final will to direct monies to provide for those most in need after my departure from this life.

I shall not possess, threaten with, or use lethal weapons against anybody. My commitment to nonviolence includes the avoidance of words and actions that are intended to harm.

I shall refrain from formal oaths and communicate truthfully.

I shall always take the first steps towards peace and reconciliation in my relationships.

Under no circumstances shall I hold grudges or wish ill to anyone.

Give top priority to serving others and to prayer and study.

I will look for ways to reduce attachment to false self, including practicing not being vain about my appearance, and letting go of always having to be right.

I will choose something to fast from during Lent and Ramadan each year, and I will be conscious of my tendency to over-schedule and over-commit, and be willing to turn down opportunities when appropriate.

I shall always take the first steps towards peace and reconciliation in my relationships. Under no circumstances shall I hold grudges or wish ill to anyone.

When I am tempted to judge, I will look with the eyes of Jesus that are patient, loving and compassionate.

I will choose trust over anxiety when I feel stress about time, health or other aspects of my finiteness.

I will be present to each moment, without letting unproductive inner monologue distract me.

listen first to those who seek my counsel before speaking

empower others to find their way of ministering to those in need in the world around them

stick to my gluten-free diet

I will fast from solid food during daylight hours on Ash Wednesday and Good Friday and other times when I feel called to do so as health permits.

During each season of Lent I will prayerfully choose one or two habit patterns to address.

I will, as health permits, get regular exercise through daily walking and engage in more vigorous exercise at least once a week.

I will seek out a balance of solitude and time with others, being sure that I regularly have some significant alone time as well as interactions with family, friends and colleagues.

Remembering how little I really need and that all I have is held in trust for God I will resist the temptation to accumulate.

## **5 – Retreat**

I will incorporate silence into my life, spending at least one 24-hour period a year on silent retreat, and finding ways to bring the silent posture of listening into other parts of my life, including time in nature.

Take chances for retreat when I can.

At least twice per year, I will go on retreat to dedicate quiet time with God. This will be with other Tertiaries if possible.

attend Retreats yearly at least one that includes 24 hours of silence

I will, with God's help, attend a guided retreat at least once a year, preferably with a Franciscan orientation. I will look for opportunities to do so with other Tertiaries.

I will plan a private retreat of at least two days and three nights at least once a year.

Each year, I shall take retreat at ..... Hermitage (spring) and ..... Hermitage (fall) for rest, reflection, and fellowship.

I shall maintain a restored wildlife habitat at the .... Hermitage to promote kinship and harmony with nature

## **6 – Study**

I will take time each week to read and contemplate materials that will help to deepen my understanding of scripture, Franciscan spirituality and the journey with God.

I will spend time each week reflecting upon the scriptures (especially the Gospel) for the upcoming Sunday lectionary readings and/or engage in systematic scriptural study.

Study privately and follow up chances to study with others.

At least once each year I will attend a workshop or class (in person or on line) that will deepen my spiritual life.

Each week, I will dedicate significant time to reading and learning about God’s interaction with the world. This will include reading the Bible and commentaries; studying the lives and work of Francis and other saints, prophets, scholars and mystics; appreciating the insights and creativity of artists of various kinds; and treasuring the beauty of nature.

I shall read and study Scripture daily.

I will make a practice of reading and studying Scripture, and responding to it artistically or in writing and preaching.

I will do some reading Christian and Franciscan history, theology, and spirituality.

I will also keep up on research and writing on the topics of gratitude, and our relationship to the rest of Creation.

I shall expand my knowledge and experience of Franciscan spirituality through weekly readings and study of the TSSF formation materials.

daily reading including bible study, Franciscan Spirituality and TSSF materials

teaching adult or youth classes

I shall read and study Scripture daily.

I shall expand my knowledge and experience of Franciscan spirituality through weekly readings.

## 7 – Simplicity

I will use my finite days wisely by resisting unexamined temptations to fill time with either meaningless pleasure or excessive work.

I will shed attachment to material possessions and the status they bring, in order to share more freely with those in need.

I will value the marigold as much as the lily.

working in vegetable garden and canning, buying in bulk what is needed to supplement canning

eating healthy and cooking at home

recycling

making donations/pledge

limiting purchases to increase money available for donations

I shall strive to have only the least expensive and minimum amount of clothing and accompaniments needed for comfort, employment, and utility in order to avoid excessiveness and false image. In order to avoid excess, any purchase of clothing or accompaniment must result in a related possession donated to charity.

I shall live as simply and inexpensively as possible according to my state in life. I shall have the minimum number of and least sophisticated appliances, furnishing, and home accompaniments as necessary without neglecting my family or vocational needs.

I shall primarily use only one vehicle for personal use to be supplemented by walking and biking for transportation.

I shall strive to be self-sufficient, nutritious and frugal with my food needs through a vegetarian diet provided by gardening, bread-making, and basic staple preparation from dry goods

When purchasing food items or material goods, I will purchase locally or from ethically produced businesses.

Live simply and gratefully. Enjoy the isolation enforced by the pandemic.

Rejoicing in my possessions, abilities, education and many privileges as gifts on trust from God, use them to advance God's kingdom.

Eat healthily and thankfully.

I will consider everything that I have to belong to God, and strive for good stewardship of my body, my time, my income, and my possessions.

As far as is in my control, I will maintain my body in good health.

I will be conscious of where my money is spent, and my motivations for spending.

I will live as simply as possible, mindful of the impact of my actions on the planet and on other people and creatures.

I will purchase as much as possible of clothing, furnishings, and technology second-hand, and will recycle and compost everything possible.

I will eat a strictly vegetarian diet, and minimize consumption of any animal products.

I will continue to tithe, giving of my financial resources to my local church, TSSF and other charitable organizations.

I will give generously of my time and material resources to my family.

I will give of my time to the church and to serve those in need.

I will be attentive to how I think about financial issues, working toward finding a wholesome balance between careful fiduciary responsibility for that which has been entrusted to me by God and living in the joy of God's abundance.

## **8 – Work**

I will support my children to ease the stress of childrearing, and will be lovingly attentive to my grandchildren to help them grow into their full potential.

Serve my family and friends with good humor.

Be alert for opportunities as they arise to help others in my daily life.

When restrictions are lifted, serve patients through my hospital ministry.

Serve Franciscan tertiaries as chaplain.

Serve as formation counsellor if that is confirmed.

Guide, serve and learn from those who seek to understand the Franciscan way.

Seize opportunities to join peaceful resistance to injustice.

Involve myself in my church.

Take time to explore my ideas for writing.

Work to present my mother's life story in a way that glorifies God's action in her.

I shall actively and humbly welcome and serve the needs of all children, families, alumni, and staff at the ..... Children's Home as the campus director.

I shall mentor younger generations to respect and care for Creation through weekly geographical literacy sessions and permaculture projects.

I shall courageously bring to awareness systems, policies and practices in my workplace and community that harm the human spirit and creation, and actively join in peaceful protest and open dialogue to promote the positive transformation of society and our world.

I will continually discern my abilities truly, so that I can work where I am most effective and trust that "all shall be well" whether or not I can contribute to an effort.

I will consider being "love in action" to be my work in the world. How I spend my time is a matter of stewardship, and I will strive to do all my activities with an openness to how I might be serving the Lord in them.

I will give my time freely to people who need my presence or my help.

I will make art with the goal of connecting people with God.

I will serve the church with my talents in art, in leadership, in preaching, and in mindful ministry.

I will be a witness to my neighbors and friends of the joy of a simple and responsible lifestyle.

I will serve the Order as a Formation Counselor and Chapter member, or in other ways as called.

As I am involved in daily work, diocesan work and community work, I will, with prayerful effort, allow the Jesus in me to meet the Jesus in those I serve.

I will support my children and grandchildren offering them my love that by example I may bear witness to Christ's love.

I will engage in creative projects such as writing, painting and music for at least 30 minutes at least five times a week.

I will make myself available to preach and/or celebrate on Sundays or other liturgical occasions to support the ministries in the area where I live.

I will help at the church I am attending as requested.

## **OBEDIENCE**

I shall pray the Morning, Midday and Evening Prayer each day with the Community Obedience.

I shall attend the local Third Order fellowship meetings monthly.

I shall renew my vows annually.

I shall receive monthly spiritual direction for my personal formation.

I shall provide an annual financial contribution to the Third Order of the Society of St. Francis.

I shall provide timely reports to my formation counselor and comply with the TSSF Constitution and Statutes.

## **COMMUNITY COMMITMENT**

I will pray the Daily Office, either Morning or Evening Prayer daily, and say the Community Obedience daily. I will meet regularly with my spiritual director, and renew my vows yearly. I will attend local fellowship meetings and provincial convocations as often as possible, and contribute financially to TSSF every year. I will report regularly to my formation counselor. I will be obedient to the TSSF Constitution and Provincial Statutes.

## **Appendix E: Formation Bibliography**

List of recommended readings and other resources for each stage. Currently being compiled.

## Appendix F: Common Abbreviations

AC	Area Chaplain
AFG	Assistant Formation Guardian
AFGN	Assistant Formation Guardian for Novices
AFGP	Assistant Formation Guardian for Postulants
AFGW	Assistant Formation Guardian for Welcome
BCP	<i>Book of Common Prayer</i>
CSF	Community of St. Francis
DC	<i>Devotional Companion</i>
EP	Evening Prayer
FG	Formation Guardian
FT	<i>Franciscan Times</i>
HE	Holy Eucharist
IPTOC	Interprovincial Third Order Chapter
JPIC resources)	Justice, Peace, and Integrity of Creation (TSSF committee with
LOA	Leave of Absence
PC	Provincial Chaplain, or Provincial Convocation
PP	Personal Prayer
MP	Morning Prayer, or Minister Provincial
RC	Roman Catholic
ROL	Rule of Life
SSF	Society of St. Francis
SD	Spiritual Director, Spiritual Direction
TSSF	Third Order, Society of St. Francis