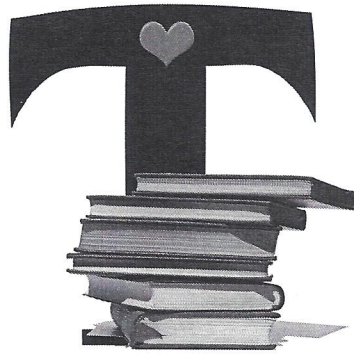


SECULAR FRANCISCAN ORDER
(ORDO FRANCISCANUS SAECULARIS)



For Up to Now

Foundational Topics for Initial Formation

Prepared by the National Formation Commission
of the National Fraternity of the Secular Franciscan Order – U.S.A.
--- 2011---

*“Let us begin FOR UP TO NOW we have done nothing.”
~Francis of Assisi~*

TABLE OF CONTENTS

FOUNDATIONAL FORMATION TOPICS	5
Orientation	5
Inquiry	5
Candidacy	6
Introduction	8
Forward from the Minister General of the Secular Franciscan Order.....	8
Introduction from the International Presidency of the SFO.....	9
Conclusions of the XII General Chapter of the Secular Franciscan Order	10
The priorities of the General Chapter	11
FORMATION	12
The Presidency.....	13
Forward to the US version	14
From our National Minister	14
Brief history of this formation process	17
Toward an SFO Ratio	19

FOUNDATIONAL FORMATION TOPICS
INCLUDED IN THIS *FOR UP TO NOW*
(FUN) MANUAL

Forward from our Minister General

For the Formator

What is Formation

Orientation

Basic Catholic Doctrine

Ecclesiology of the Laity

Introduction to the Franciscan Family

Inquiry

Vocation

Identity of a Secular Franciscan

Nature of the Secular Franciscan Order

Vocation, Charism and Mission in the Church

Franciscan Movement part 1 – Journey of Francis

Franciscan Movement part 2 – your own journey

Candidacy

The Rule of the Secular Franciscan Order (3 sessions)

JPIC with synopsis of Catholic Social Teaching (2 sessions)

Francis and his approach to Divinity (2 sessions)

Franciscan Theology, Tradition and Spirituality (1 or 2 sessions)

Profession (2 sessions)

Penitence and Conversion

Fraternity

Francis and the Blessed Virgin Mary

St. Clare of Assisi

History of the Secular Franciscan Order and its Rules

Portions of this document are adapted from
“Forming the Formators”
CIOFS 2008

Thank You

Our International Presidency and the International Formation Commission, especially the Chair, Benedetto Lino, OFS deserves our heartfelt gratitude and thanks for their dedication to this project.

Benedetto Lino OFS (Italy), Coordinator; **Marie-Odile Blanty** OFS (France); **Marie Amore** OFS (USA); **Tibor Kauser** OFS (Hungary); Fr. **Irudaya Samy** OFM Cap. (India); Fr. **Martin Bitzer** OFM Conv. (Argentina).

This initiative to revitalize our formation process and provide training for the formators of the Order was a true labor of love.

When the Presidency approved the content, they knew that if these materials were implemented, it would deepen our understanding and strengthen our commitment to the fundamental elements of our vocation, worldwide.

It took creativity, cooperation and a lot of energy on the part of the entire Presidency and Formation Commission to see this commitment through to completion and pass their dream on to the National Fraternities.

Further, it was the Presidency's hope that once it was in our hands, each National Fraternity would make sure that it reached all the local fraternities, the privileged places, where the Franciscan Life of all our brothers and sisters could be formed and enhanced by it.

This was our goal also in developing these materials for the SFO-USA

National Formation Commission - USA

Introduction

Forward from the Minister General of the Secular Franciscan Order¹

“This [Formation] was by far the theme that received the most attention. The importance of formation has emerged as the essential element to guarantee an authentic and deep sense of belonging, rooted in a clear notion of identity and knowledge of the true nature of the OFS and of its place in the Franciscan Family and in the Church. The Chapter has manifested the urgency of finding new, original and efficacious ways to give to formation the completeness and uniformity which an Order, spread around the whole world, deserves to accomplish the fundamental role of mature and authoritative apostolate it is called to offer, in collaboration with the rest of the Franciscan Family”.
(Conclusions, General Chapter 2002)

This is how the service of the Presidency elected for the sexennium 2002-2008 was inaugurated, with a strong and clear mandate of the General Chapter to engage itself to give to the Order a strong, complete formation, rooted on identity, sense of belonging and on the knowledge of the true nature of the Order.

The Presidency has accepted this mandate with conviction and love and used its best efforts to achieve this goal, not without some trepidation on the outcome of the project. This Manual is the concrete testimony of this commitment, together with the living testimony of all those who, in Rome or elsewhere, have already implemented the project and this formation material.

We thank God, who assisted us with His Love and Providence, as well as all the brothers and sisters who have believed in the project and supported us. A special thank goes to the members of Presidency Formation Commission² who have worked with great sense of duty and enthusiasm and also to the benefactors who have made possible the realization of this project, despite our lack of resources.

Encarnación del Pozo, OFS
Minister General

¹ Extracted from the CIOFS “Forming the Formators” Manual – CIOFS Presidency 2008

² **Benedetto Lino** OFS, Coordinator; **Marie-Odile Blanty** OFS (Francia); **Marie Amore** OFS (USA); **Tibor Kauser** OFS (Ungheria); Fr. **Irudaya Samy** OFM Cap. (India); Fr. **Martin Bitzer** OFM Conv. (Argentina).

Introduction from the International Presidency of the SFO³

In a certain sense the Order of Penitents of Saint Francis (Franciscan Third Order), in its secular component, today called SECULAR FRANCISCAN ORDER⁴, lives a **new era**, some kind of rebirth marked by the new Pauline Rule, the new General Constitutions, new Statutes, the new Ritual and an Ecclesial Status clearly redefined.

“In the process of renovation of religious life called for by the II Vatican Council, all the religious Institutes had to question their institutional identity in the light of the new doctrinal acquisitions “canonized” by the Council and to offer an adequate response of their charism to the changed conditions of times.”⁵

The SFO is not a Religious Institute of Consecrated Life, however our foundational history, our laws, our Profession place us in a state which makes these words applicable to us as well.

Let us not forget, moreover, that the same Papal Magisterium has defined us a «True Order» and a «Lay Order»⁶. We must, therefore, become fully aware that our Order is a «unique» reality in the history of the Church.

This process of renewal has already produced deep changes in our structures and in the way we “understand” our Order and ourselves as members. Such changes, however, have remained, to a large extent, confined to some restricted circles and have a hard time to break through without a strong effort to “push” formation to reach the very roots of the Order.

All this demands:

- a clarification of the **identity of the Order**
- awareness of being an authentic and **essential component** of the original **Franciscan Trilogy**.
- a great effort to **integrate** into the DNA of each of the individual OFS members and of the OFS, as a whole, the complete dimensions of **Secularity, Unity, Autonomy**
- a new **understanding** and **awareness of the role that the OFS**, and consequently every Secular Franciscan, has in the Church and in the Franciscan Family,

³ Extracted from the CIOFS “Forming the Formators” Manual – CIOFS Presidency 2008

⁴ The official name of the Order is : *ORDO FRANCISCANUS SAECULARIS*. In this text we will refer to our Order always with the acronym **OFS**.

⁵ **A. Boni** OFM, “La Novitas Franciscana nel suo essere e nel suo divenire”, Spicilegium Pontificii Athenaei Antoniani, pag. 13

⁶ **Benedict XV**, Encyclical Letter “Sacra propediem”; **Pious XII**, Speech to the Tertiaries, 1st July 1956; **John Paul II**, to the SFO General Chapter, 14 June 1988.

The Presidency Formation Commission, and subsequently, the Presidency itself, after a close study and consideration, have approved a project to reshape the INITIAL FORMATION OF SECULAR FRANCISCANS of the entire Order. This Manual is the outcome of this project.

Let's go on full of confidence and *“let us begin, brothers, to serve the Lord God, for up until now we have done little or nothing”* (1C 103).

Benedetto Lino, OFS
Presidency Formation Commission Coordinator

Conclusions of the XII General Chapter of the Secular Franciscan Order⁷

In order to better understand and focus our energies as an Order, as a National Fraternity, as Regional Fraternities, and as numerous Local Fraternities, all places where our vocation is actively lived out, I have included the remarks expressed by the Conference of General Spiritual Assistants. This following section is excerpted from the “Conclusions of the XII General Chapter of the Secular Franciscan Order” as reported in the publication of the Conference of General Spiritual Assistants, “Koinonia” 2009-1 Year 16 # 61.

The XII General Chapter took place in Hungary in order to conclude most appropriately the biennial celebration of the 8th centenary of the birth of the beloved Patroness of the OFS, Saint Elizabeth of Hungary.

The key themes of the Chapter, the *Profession of Secular Franciscans* and their *Sense of Belonging*, were masterly developed by the lecturers, Fr. Felice Cangelosi OFM Cap. and Emanuela De Nunzio OFS, offered full and expectant stimuli and precious indications to continue in the direction already undertaken.

The rich and vibrant report of the Minister General, Encarnación del Pozo, bore a strong witness to the commitment of the Presidency and to the great quantity of work accomplished in the past six years. The report provided a cue for the following reflections, which resolutely aimed at a continued commitment to formation and on a full assumption of the secular dimension of our lives with all the consequences that ensue from it.

The OFS is the part of the Family that lives this dimension in all its fullness and it cannot fail in contributing this essential element to the mission of the entire Franciscan Family.

⁷ “Koinonia” 2009-1 Year 16 # 61 www.ciofs.org/Koinonia/a9enkoinic.htm

The Chapter was blessed by abundant gifts of spiritual and concrete reflections and suggestions: the report of the Minister General, Encarnación del Pozo, the report of the President of the Elective Chapter, Fr. Marco Tasca, OFM Conv. Minister General, on the "*Beginning of the Charism*", the report of the Conference of the General Spiritual Assistants presented by its President in turn, Fr. Irudaya Samy OFM Cap., the reports on the Emerging National Fraternities, on Formation, on the Presence in the World, and on the Franciscan Youth.

The Chapter acknowledged with joy that the Order is still in existence or is starting up in many countries, including in those areas where religious persecution, atheism and secularization have reduced the presence of the Church to a bare minimum or even wiped it out completely.

The Order has also made a strong reflection on itself. The exponential increase of activities, the service to be offered to the Emerging Fraternities and the increasing needs of the Order, also from the economic point of view, demand a firm commitment by each and everyone and a more effective and incisive communication.

It was also acknowledged with joy that Franciscan Youth is growing and strengthening in several countries but that the Order must also commit itself more actively and with more determination at all levels to responsibly fulfil its essential role in animating Franciscan Youth in their Christian and Franciscan vocational journey.

The Chapter was a great experience of sharing and fraternity. The fraternal joy, the happiness of being together with brothers and sisters from all over the world, especially from the poorest and persecuted countries, was for all a privileged moment of grace.

The sincerity and depth of the feelings shared by all during the Chapter is a concrete wealth that each of the capitulars will have to share with all the brothers and sisters of their own countries.

The presence of several observers, including Franciscan religious from a number of countries, bore witness to the interest for the Order and for its development.

At the conclusion of its works, the Chapter indicated the fields of action and the priorities to be implemented by the whole Order during the next six-year period.

The priorities of the General Chapter are as follows:

1. FORMATION
2. COMMUNICATION
3. FRANCISCAN YOUTH
4. PRESENCE IN THE WORLD
5. EMERGING FRATERNITIES

For purpose of this formation project, we will focus on the formation priority⁸.

FORMATION

Formation remains the top priority of the Chapter for the entire Order.

The Chapter recognized the importance of the Formation Project, which has already been initiated, and has decided to continue in the same direction so as to fully implement the initial formation course in every part of the world. **Great importance is attached to the formation of formators, and to the necessity of making sure that local Fraternities are reached by the Formation Project.**

In addition to the topics already proposed, it is requested that the Formation Project include the following topics:

1. Social doctrine of the Church;
2. Better understanding of the significant social and political problems of the day;
3. Social and political commitment of Secular Franciscans in the world;
4. Development of aids for a more focused and deeper study of the SFO's own legislation - Rule, General Constitutions and Ritual; and
5. Most important documents of the Church and of the Magisterium.

The Chapter further recommends that the Presidency promote permanent Formation by proposing, to all the fraternities in the world, a central theme of annual formation and provide the necessary indications and aids to develop and study this theme.

Moreover, it is recommended that formation be implemented, not only at an intellectual level, but also on the practical level of concrete charity.

The Chapter recognizes that the *sense of belonging, vocation to fraternity, and the importance and nature of the commitment of Profession* are all fundamental elements in the life of Secular Franciscans that must be undertaken, underlined and re-proposed with strength in initial and permanent formation.

It is recognized that strong and qualified projects to **promote vocations** to the Secular Franciscan Order are urgently needed at all levels. It is also recommended that joint formation meetings be organized between Secular Franciscans and Franciscan religious.

⁸ This document can be found in its entirety on the CIOFS website: "Koinonia" 2009-1 Year 16 # 61
www.ciofs.org/Koinonia/a9enkoinic.htm

The Chapter also requests that the Presidency prepare adequate instruments for the formation of lay spiritual assistants and assistants who are not members of the First Order or the Third Order Regular.

The Presidency

- ✓ shares, makes its own and receives with attention all the requests and recommendations of the Chapter and commits, for whatever falls within its responsibilities, to implement them to the best of its ability;
- ✓ formulates the following observations and recommendations for all the Fraternities of the whole world:
 1. **The Conclusions of all Chapters are binding for the Presidency but also, and perhaps even more, for all the Fraternities of the whole world at all levels and for each and every Secular Franciscan.** Therefore, they must be the object of a continuous and attentive consideration by all. The entire Order, as a single body, has to strive in every possible way to implement them. It is, therefore, requested to do everything possible at all levels to make known, implement and verify the objectives set by the Chapters.
 2. The effort to deepen and assume the proper identity of Secular Franciscans must continue more intensely than ever according to what has been indicated by the Chapter and by the Formation project.
 3. The commitment to work in order to achieve a true communion of “being” and “doing” as Franciscan Family must grow and the OFS must be a qualified actor in this process.
 4. It is fundamental that the International Councillors, in the process of gaining awareness of their essential role, realize that their responsibility goes beyond their own National Fraternities and towards the Presidency to include the whole Order in its entirety.

Forward to the US version

From our National Minister

Beloved Secular Franciscan Formation Workers in the Fields of the Lord,

First of all, please say a prayer of thanks for the good people from CIOFS (particularly Benedetto Lino SFO, Coordinator (Italy); Marie-Odile Blanty SFO (France); Marie Amore SFO (USA); Tibor Kauser SFO (Hungary); Fr. Irudaya Samy OFM Cap. (India); Fr. Martin Bitzer OFM Conv. (Argentina)), and from our National Formation Team (Robert L. Fitzsimmons SFO Chair, Richard Trezza OFM, Jan Parker SFO, Kathleen White SFO and Rena Xuerub, SFO), plus other Secular Franciscan writers and editors who have worked hours and hours to bring you this Formation Manual. They deserve all our prayers and thanks.

Second, please accept my sincere thanks on behalf of the entire National Family for your efforts to call and form true, lifelong Secular Franciscans by using these materials.

To paraphrase, “Receive this document whose facilitator you are. Believe what you read. Teach what you believe. Live what you teach!” (See the Ordination Rite for Deacons).

Third, relax. The Secular Franciscan Order in the United States is not “your” Order or “my” Order or even “our” Order. It is the Holy Spirit’s Order.

If this Formation Manual comes from God through you, then it will bear fruit. If this manual is mere words without the Word, then please don’t bother to try to breathe life into this document. You don’t have the power.

Thus, never open this manual without bringing it to prayer.

Forming true, lifelong Secular Franciscans is never only about any Formation Manual, however inspired as I pray this one is. Nor is true formation only about you or I, however holy we may feel ourselves to be, and I pray that this manual may help us on the road to holiness. No, this enterprise is either from God and leading to God or it’s a sham and a shame.

To paraphrase one last time:

“You may spread this seed (evangelization); another may water (catechesis); but only God will give the life (‘right faith, firm hope and perfect charity’)” (see 1 Corinthians 3:6-7). Let us pray without ceasing, therefore, that this Formation Manual will help us form true, lifelong Secular Franciscans (including ourselves) AS GOD INTENDS, CALLS AND BRINGS TO FRUITION.

Peace with love and prayers,

Tom Bello, SFO
National Minister
Secular Franciscan Order
United States of America

Dear Sisters and Brothers;

Over the past two and a half years, the National Formation Commission and a host of dedicated Secular Franciscans have diligently labored to to adapt the original CIOFS "Forming the Formators" materials for use here in the United States.

It was also, in the mindset expressed by the The XII General Chapter (2008) and our Minister General to expand the CIOFS materials in order to develop a comprehensive manual which would serve as the foundation of Initial Formation. It was our charter from our own National Executive Council to present specific topics and textual material, based on the Guidelines for Initial Formation, 1985 and the direction set by CIOFS.

These topics would form the fundamental basis of formation for the Order here and would constitute the areas deemed essential in the formation of the Franciscan person.


Our intention is:

- to develop a more uniform formation process across the USA
- to define essential elements of this formation, concretely
- to provide our formators with easy to read and use materials that includes texts suitable for those in formation along with teaching aides, lesson plans, objectives, prayer actions, etc to make facilitating the local and regional formation process easier and more user friendly.
- Lastly to increase our own understanding of who we are called to be as Franciscans, enhance our sense of belonging and ownership of our Order and to pass this Franciscan spirit on to others who respond to this same vocation.

It has been an intense time and I cannot extend adequate thanks to all those who participated in this project, writers, editors and our sisters and brothers from the Presidency formation commission. I can only accept your gracious gift to our Order and offer back my blessing and prayer.

On behalf of the National Formation Commission; peace and all good!


Robert L. Fitzsimmons, SFO
Formation Chair


Richard Trezza, OFM
Formation Spiritual Assistant


Jan Parker, SFO


Kathleen White, SFO


Rena Xuereb, SFO

"We have done what was ours to do, may the Lord show your what is yours!"

Brief history of this formation process

This abbreviated history is provided by Anne Mulqueen, SFO, our International Councilor.

I am writing because it gives me such joy to know that what I experienced in Rome in 2006 will now be available to you in May 2011!

If you have a moment and have an interest, I'd like to give you some history on this International Formation Project which began nine years ago and will have its American debut in May of this year (2011).

It began at the 2002 General Chapter where formation was voted the highest priority for the entire Order and national fraternities were asked to send formation materials to the Secretariat in Rome. The USA did so. Thereafter, an International Formation Commission was established under the leadership of Benedetto Lino, OFS, Presidency Councilor for the Italian-speaking countries.

The USA was included in this initiative in 2004 when Marie Amore, SFO joined that Commission. Others on the commission were Marie-Odile Blanty, OFS from France, Tibor Kauser, OFS from Hungary, and Irudaya Samy, OFM Cap, General Assistant. General Assistant Martin Bitzer, OFM Conv joined them later.

They met in Rome a few times under quite "primitive" conditions (money is always tight!) and they quickly became aware of the diversity of formation materials coming in from different national fraternities. Quoting Benedetto Lino, OFS, "[they felt an] urgency of finding new, original and efficacious ways to give to formation the completeness and uniformity which an Order, spread around the whole world deserves..."

Now all they had to do was develop a program that would guarantee a profound sense of belonging, rooted in a clear understanding of the nature of the SFO and its place in the Franciscan family and the Church. No easy task but they did it.

Two International Workshops for National Formators were held in 2006 and 2007. The first Workshop: March 2006—for the English-speaking countries. There were 17 countries represented. Marie Amore, Teresa Baker and I were present but in different capacities. We made wonderful and lasting friendships, and I am still in touch with some of the participants. I thank God and the SFO-USA for this opportunity. The second Workshop: March 2007 was for the Spanish and French-speaking language groups.

At the 2008 Chapter, the International Councilors were given a manual containing the workshop presentations and instructed to take the material back to their National Formation Director, with instructions to adapt it for use in their own country. And, again, at the 2008 General Chapter, formation was selected as the top priority.

If you are still with me, I'll let you in on the desire of my heart. I pray that after the workshop in May, you take the ball and run with it. This workshop does not mark the completion of the project—it's just halftime. Fitz, his Commission and many others have worked long and hard adapting this material for our use, but if it doesn't get from the regional level to the local level, the dream that started in 2002 will fizzle for the USA.

CIOFS has done what was theirs to do. Fitz and his people have done what was theirs to do. Soon it will be in the hands of the regional councils and formators to do their part so that the local fraternities will have access to this material. Please make implementing this manual and sharing your experience of fraternity a priority. I know Fitz and his gang will assist you in whatever way they can.

In peace and with lots of fraternal affection,

Anne

February 2011

Editors note: Anne Mulqueen, SFO is our elected representative from the National Fraternity of the United States to the General Chapter of the Secular Franciscan Order. As such Anne is our capitular (voting delegate) for the General Chapter of Elections, which is where the national fraternities elect our Minister General and Presidency councilors.

Toward an SFO Ratio

A “ratio” is a plan of formation and study needed to prepare a person for a lifelong (perpetual) Profession into an Order or specific Spiritual Charism. The Formation Commission of Our International Presidency (think Minister General) at the direction of the General Chapter of the Secular Franciscan Order (our Order’s highest level of governance) gave to all National Formators their plan to train all formation directors within the Order, and at all levels of the Order.

The International Presidency, also called CIOFS (Council International of the Ordo Franciscanus Saecularis), presented their plan to us after General Chapter of 2008. This formation initiative became the primary focus of the National Formation Commission of the USA (NFC), who began to develop a comprehensive plan to train our formators and to provide materials they could use for the Initial Formation Process.

With that, the NFC developed a comprehensive plan based on the focus received from CIOFS and we are happy to offer formation directors and fraternities at all levels within the USA our suggested implementation Plan and Topical Suggestions for each phase of Initial Formation for the Secular Franciscan Order.

The suggested plan below is set up in what seemed to us a logical progression building an increasing depth of knowledge in developing both understand and competency in Franciscan Theology, Spirituality, Charism and our Mission in service to both the Gospel and to the Church.

You will notice that in Orientation we mention RCIA. We are aware as are our First, Second and Third Order Regular Brothers and Sisters that more and more folks come to see what we are about, but they themselves are poorly catechized in the basics of the Catholic Faith. While we have suggested and developed a short review of those Doctrinal Foundations, it is the responsibility of the individual to first understand the Basics of our Faith. If more than this simple review is necessary, then we suggest the person be asked to complete a year or so in the RCIA process of the local Catholic diocese or parish, and then return to explore if they have a real and valid vocation to become a Secular Franciscan.

While the formation process must by nature present material to read, study and comprehend, the ultimate goals are to first discern if the seeking individual (sometimes called aspirant in the Order’s document) is called by the Holy Spirit to our particular spirituality. Does he or she have a true vocation or just the desire to “join” a new group? Second and much more important is that the formation process must provide and reinforce the tools and insights that can open the doors to true transformation. Our model is the Way of St. Francis of Assisi, his insights and his desire to imitate Jesus have been passed to us for the past 800 years.

Here is our Plan for Initial Formation for all individuals seeking Profession into the Secular Franciscan Order. You may notice, there is no hard and fast sequence for the topic areas

we have presented. In fact every Regional Fraternity will be asked to develop an implementation plan, which can be this suggested one or any sequencing they desire as long as the "Fundamental Topics" are adequately presented so those in formation come to understand and comprehend the vocation they are seeking to undertake.

One of our goals was to insure this formation manual is easy to use, is comprehensive, is in accord with our directions from CIOFS and has up to date Franciscan Scholarship that is approached with the Secular Franciscan in mind.

You will also see some of the topics identified with the following symbol [C]. This indicates that this material was taken directly from the CIOFS materials and with their permission, adapted for use here in the United States.

But you will also see a host of other materials: topics on the Rule, on JPIC & Catholic social teaching, our Blessed Mother, St. Clare, etc. We have added these as other key elements that form us into Franciscan people, able to follow Francis to Christ.

The CIOFS topics and the additional ones added by the National Formation Commission combine to form a comprehensive package that can be used to form both the formation directors (formators) as well as those seeking Initial Formation.

This material which can be used as the Formators reference material or the main text for the Formation Process, begins the standardization required by the XII General Chapter and adds specific content required by the Guidelines for Initial Formation (1985, 1992, 2001)⁹

⁹ Guidelines for Initial Formation 1985 and Elements of Formation 1992 are available from Smoky Valley Printing see forms on the back cover of any TAU-USA. Guidelines for Initial Formation, Rome 2001, is available on the *For Up to Now* reference disc