

Sample Formation Handbook for the Pre-Novitiate Stages

The Affiliate

The Postulant

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This handbook was part of Sr. Anita's final *ForMission* project in July 2011.

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RFC gratefully acknowledges her generosity to make this handbook available as a resource for RFC members and program participants.

(Name of Congregation)

***Vocation / Formation Handbook for
the Pre-Novitiate Stages***

The Affiliate

The Postulant

Introduction to the Process of Formation

The goal of initial formation is to enable each person to develop a basic understanding of religious life in preparation for total consecration of oneself to God in the following of Jesus as a member of (Name of Congregation). It is a life-long process of conversion and transformation in Christ, the Redeemer. The person journeys through the various phases of formation in order to come to greater clarity about one's personal experience of being called by God to religious life within this Congregation.

Formation is here understood in a dynamic sense, an active and focused response to the movements of the Holy Spirit. This requires generosity and acceptance in faith of God's grace. The call to Religious Life is an experience of being planted in good rich soil – soil that is nourished through sharing life, faith, mutual support and challenge.

The formation and educational development of new members is of the greatest importance for the life of the Congregation, as is familiarization with its constitutions. This formation and development is accomplished gradually, in different phases during the pre-novitiate, novitiate, and temporary professed periods of formation. Formation of new members is the heartfelt concern of all sisters, brothers and clerical religious who participate in this process through personal prayer, spiritual witness and ministry as a member of (name of the Congregation).

This handbook is designed for the woman or man in the Pre-Novitiate stages of formation, the *Affiliate* and the *Postulant*. It provides the person with a common understanding of the formation process. Each stage is presented in an outline consisting of the following areas: Purpose, Length, Components of the Program, Dimensions, Signs of Readiness for the next stage, and Requirements for moving to the next stage. The appendix contains specific forms that are needed at particular times throughout the Affiliate and Postulant journey.

Vocation Program

Affiliate

(Insert a quote from the Constitutions)

Introduction

An Affiliate is a woman or man who, along with the Vocation Director, has made the decision to pursue his/her desires of being called by God to religious life and who wants to engage oneself more fully with our Congregation.

Purpose

The goal of the Affiliate Program is to assist the person in developing one's spiritual life and discerning whether or not one is called to religious life, in particular, (name of the Congregation). The person learns about the charism and spirituality of the Congregation and gains greater clarity of where God is calling the person through a mutual discernment process.

Length

Participation in the program is appropriate as long as the Affiliate is in the discernment process and moving towards a decision. The length of the Affiliate phase is one to two years.

When the Affiliate along with her Director, discerns God's call to the Congregation, the Affiliate may request to begin the pre-entrance process. This time of direct preparation for entrance into the Congregation as a Postulant is referred to as the Candidacy.

Symbol

(Describe the religious symbol worn by the Affiliate)

Components of the Program

- meets with the Affiliate Director every 3-4 weeks
- participates in celebrations and feasts of the community
- participates in inter-congregational workshops
- spends at least one weekend per month or two weekdays per month with the formation community or a local community
- participates in formation gatherings with others in Initial Formation along with the Formation Directors
- establishes goals and participates in an evaluation process
- completes assigned readings and reflection papers
- meets monthly with a Spiritual Director
- attends meetings with the Congregation when appropriate

Dimensions

Human/Psychological

- grows in self-knowledge and personal integration
- grows in the ability to express feelings effectively
- grows in freedom and responsibility in order to make personal decisions
- develops capacity for interpersonal relationships and friendship
- recognizes one's personal gifts and talents so as to use them in service to others

Spiritual

- deepens relationship with God through personal prayer
- deepens Christian life and sacramental practice
- learns various prayer styles

Community

- grows in capacity to relate well with self and others
- expresses interest and enjoyment in being with the community
- initiates involvement with the community

Congregational

- deepens understanding of the mission, charism and spirituality of the congregation

Apostolic/Ministerial Dimension

- grows in understanding of the Catholic faith, coming to a deeper awareness of baptismal consecration and the Christian commitment
- shows concern for the poor and marginalized both locally and globally

The Affiliate Residency Program (an option for the Affiliate)

This live-in experience is designed for those who desire a more direct involvement with the Congregation. During this live-in experience the person resides in a local community for the purpose of experiencing community life as an integral part of religious life. The residency program provides an even greater opportunity for the Affiliate to get to know the congregation through one's experiences of community living. The Affiliate Resident also follows the guidelines under the section, "Components of the Program."

Responsibilities of Affiliate Resident

- Participation in most areas of local community living - community gatherings, prayer, liturgy, house chores, cooking, celebrations
- Room and board (the amount is determined in dialog with the treasurer and/or the provincial)
- Health insurance
- Medical expenses
- Personal expenses
- Car expenses (gas/mileage reimbursement if the Affiliate's car is used for community purposes)

Signs of Readiness to become a Postulant

- notable growth in clarity regarding one's call to religious life and to the (Name of the Congregation)
- greater understanding and articulation of prayer, community and mission
- healthy balance in relationships
- exhibits peace and joy in decision to move forward

Requirements for becoming a Postulant

The person is called a Candidate when he or she is making formal application to the Congregation and is preparing for entrance into the Congregation as a Postulant.

- Makes a written request to the Affiliate Director to become a Candidate at which time one begins the process to enter the congregation as a Postulant
- Completes a psychological assessment and feedback sessions
- Completes the following documents: formal application, background information, medical history and examination, and autobiography.
- Submits a letter of request to the Provincial Superior at least three months prior to entrance to the Postulancy

Formation Program

Postulant

(Quote from the congregation's founder or foundress)

Introduction

As Christians, our life is a call to holiness that invites a response. The desire for moving into the Postulancy is a continued response to this call from God. The mutual discernment of the woman or man and the congregation to join together with others in community, for the sake of God's kingdom, is an opportunity for growing in one's vocation.

Purpose

(Refer to the Constitutions for a statement on the purpose of the Postulancy.) It is a period of time for the woman/man to mature in her/his discernment for religious life and in particular, to the charism and mission of the (Name of the Congregation). As the person's relationship with the community deepens, the desire, readiness and capability of the person to remain in the formative process continues to be discerned.

Length

The Postulancy lasts for a period of one to two years. The time of the Postulancy is based on mutual discernment of the readiness of the woman or man to continue formation into religious life by entrance into the Novitiate

Symbol

The person receives (name the symbol or religious item) symbolizing one's commitment to be an active participant in the on-going process of discernment.

Components of the Program

A person choosing to continue the discernment of religious life as a Postulant demonstrates the maturity to make use of time and resources that will further develop one's relationship with God and community members, support spiritual growth and enable the person to be present to those one serves. The Postulant Director accompanies the woman or man as one explores the authenticity of one's call to the (Name of the Congregation.) The Postulant's responsibilities are as follows:

- meets with the Postulant Director every two weeks
- reads and reflects on the history, heritage, spirituality, and mission of the (Name of the Congregation)
- attends formation gathering for (Name of the Congregation) two weekends per year
- participate in the inter-congregational conferences and classes
- meets monthly with a Spiritual Director
- takes monthly prayer days and makes an annual directed retreat
- completes self and communal evaluations annually

Dimensions

Human/Psychological

- develops a growth plan following the psychological assessment in collaboration with the Postulant Director
- shows personal growth and integration by on-going reflection one's personal journey and experience
- continues to develop one's capacity for interpersonal relationships and friendships
- strives for a healthy balancing of time given to prayer, work, community and leisure
- takes initiative and responsibility for life-long learning

Spiritual

- continues to deepen relationship with God through personal and communal prayer and daily Mass
- becomes accustomed to Lectio Divina
- prepares Theological Reflections on assigned readings

Community

- participates in the life and activity at the local community and congregational level
- visits the retired community members and prepares reflections of these experiences

Congregational

- experiences a deepening attraction to the spirit and charism of the Congregation
- grows in appreciation for the international dimension of the Congregation

Apostolic/ Ministerial

- continues to mature in the understanding of one's faith
- grows in capacity to integrate prayer, ministry and community experiences
- learns about the apostolic ministries of the (Name of the Congregation)
- shows concern for the suffering people throughout the world

Policies:

The postulant lives with a local community and is responsible for all of one's expenses and pays room and board to the congregation. The following policies will be reviewed to offer further clarity regarding community expectations:

- Finances (Province / Postulant Responsibilities)
- Vacation and other time away from community
- Communications including responsible use of phones and other technology
- Car

Signs of Readiness to become a Novice

- a deepening desire and readiness to follow Jesus in the spirit of (Name of the Foundress/Founder) as a member of (Name of the Congregation)
- ability to enter into a trusting relationship with the Postulant Director and the capacity to include the Director in one's spiritual and personal growth
- desire and capacity to live the mission and charism of the (Name of the Congregation)
- evidence of the capacity to live community with appropriate human and spiritual maturity
- emotional, mental and physical health and ability to recognize areas of growth
- a capacity for self-appraisal and appropriate self-disclosure
- understands that the Novitiate constitutes the initiation to religious life as a member of (Name of the Congregation)
- knows the purpose and components of the Novitiate and desires to continue on the formation journey

Requirements for becoming a Novice

After the woman or man has successfully met the goals of the Postulancy Program one prepares for initiation into the Novitiate. The Director and the Postulant prepare for the transition into the Novitiate as follows:

- The Postulant writes a letter to the Provincial Superior at least three months prior to the day of Initiation formally requesting to begin Novitiate.
- The Postulant Director presents a written summary of the Postulant's self-evaluation, local community evaluation, ministry evaluation and recommendation to the Provincial Superior and Council.
- The Provincial Superior and Council meet with the Postulant.
- All financial obligations must be resolved before acceptance into the Novitiate.
- The Provincial Superior in consultation with the Council reviews materials and decides upon admission of the Postulant to the Novitiate.
- The Postulant participates in a retreat of at least three days. This is a period of preparation that immediately precedes entrance into the Novitiate.
- There are a series of meetings that include the Postulant, the Postulant Director and the Novice Director.

Exhibit 1

Request for Formal Affiliation
with
(Name of the Congregation)

In my journey of faith and in my response to what I believe is God's call to further exploring the possibility of a religious vocation, I am asking to enter into the Affiliate Program of (Name of the Congregation.) I feel attracted to your spirituality and charism of (Name of the Congregation). I realize that this program is a process of orientation to religious life and is one of mutual discernment. During this time I hope to know, with greater clarity, my faith journey and where God calls me to be of service to His people. I agree to participate actively in the various aspects of the Affiliate Program and am grateful for the prayers of (Name of the Congregation.)

Name: _____

Date: _____

Exhibit 2

(Name of the Congregation)***Affiliate Self - Evaluation***

When the Affiliate along with her Director discerns God's call to begin the pre-entrance process, the man or woman completes this self-review of one's Affiliate journey. If the length of the Affiliate is longer than one year this review is completed on an annual basis.

Name: _____

Date: _____

Length of Time as an Affiliate: _____

Affiliate Director: _____

Please take time for prayer and reflection on your experience in the Affiliate Program.

Overall Experience as an Affiliate:

1. How has your journey as an Affiliate been for you?
 - Meetings with the Affiliate Director
 - Overnight visits to the Congregation
 - Congregational Gatherings
 - Visits to the Infirmary
 - Intercommunity Workshops

Discernment Experience:

1. During this time of discernment, what have you learned about yourself and God's personal call to you?
2. How have you become more aware of the importance of understanding your family of origin as the source of your identity and your development at this time of your life?
3. What has helped you in your discernment?
4. How have you experienced your physical, psychological and emotional wellbeing during your journey as an Affiliate?
5. How have you experienced the charism and spirituality of the Congregation during the past year?

Community Experience: (For Affiliate Resident)

1. Please comment on you experience as an Affiliate residing in a local community.
 - How is living in a local community helping you discern your call to religious life and our congregation?
 - How have these experiences been enriching?
 - How have these experiences been difficult and challenging?
 - Describe your experience of communal prayer.

Exhibit 3***(Name of the Congregation)******Postulant Self - Evaluation***

The Postulant at the end of Postulancy completes this review. If the length of the Postulancy is longer than one year it is completed on an annual basis. The Postulant Director presents a summary of this review to the Provincial and Council

1. What has been your overall general experience during this time of Postulancy?
2. What has been most significant to you?
3. What areas of growth have you noticed within yourself?
4. Where do you desire more inner growth?
5. What areas within yourself have been most greatly challenged? What has contributed your being challenged?
 - How has your “growth plan” from the feedback of the psychological assessment assisted you this year?
6. Describe concrete events and programs in the Postulancy that have helped you develop your prayer and faith life.
7. How has community life enriched you?
 - How have community experiences helped you to grow in self-knowledge?

8. Describe some of the difficulties and challenges of community life.
 - What have you learned through these experiences?
9. How was your ministry experience for you as a Postulant?
10. How have you used your talents at work in service to others?
11. How have you become more aware of the importance of understanding your family of origin as the source of your identity and your development at this time of your life?
12. Name your strengths and limits with interpersonal relationships.
13. How has the autobiography been helpful in your journey as a Postulant?
14. In what way(s) have you grown in your attraction to the Congregation and its mission, spirituality and charism?

Exhibit 4***(Name of the Congregation)*****Local Community Evaluation of the Postulant**

This evaluation is conducted in a meeting facilitated by the Postulant Director in the presence of the local community and the Postulant. The Postulant Director records the responses to the questions and then prepares a written summary that is presented to the Provincial and Council. This review is completed at the end of Postulancy. If the length of the Postulancy is longer than one year it is completed on an annual basis.

Questions for the Local Community

1. What has been your overall experience of the Postulant during her residence with you?
2. How has the local community contributed to the spirit and life of the postulant?
3. What strengths do you see in the person? Please be specific and provide examples.
4. Where have you seen growth in the Postulant during his or her time with you?
5. What were the Postulant's community responsibilities and how did he or she carry them out?
6. How has the Postulant contributed to the spirit and life of the community?
7. Would you have any recommendations for the Postulant in the area of community life?

Questions for the Postulant:

1. How have you contributed to the spirit and life of your community this past year?
 - When have you initiated ideas for prayer, activities, or community discussions?
2. How did the local community support you in your vocation journey?
3. How do you find the apostolic dimension of the community?
4. What suggestions do you have for the local community and the Postulant Director to enhance your experiences in the local community?

Names of the Members of the Local Community: _____

Postulant: _____

Date: _____

Postulant Director: _____

Date: _____

Exhibit 5***(Name of the Congregation)******Ministry Evaluation of the Postulant***

The Postulant Director gives this ministry review to the Postulant's Work Supervisor. The Postulant Director then presents the supervisor's written review to the Provincial and Council. This review is completed at the end of Postulancy. If the length of the Postulancy is longer than one year it is completed on an annual basis.

Professional Skills:

1. What is the Postulant's job title and how long has the person worked in this position?
2. What job competencies does the person demonstrate at work?
3. How does he or she use his or her talents in service to others?
4. Identify any competencies in need of improvement or development.

Interpersonal Relationships:

1. How does the Postulant relate to the work supervisor(s)?
2. How does the Postulant relate to co-workers?
3. Name his or her strengths and limitations in interpersonal relationships.

Communication Skills:

1. What are the person's strengths in the areas of Speaking, Listening, and Writing?
2. What are the person's growing points in the areas of Speaking, Listening, and Writing?
3. Does the person express oneself appropriately with co-workers and clients?

Overall Experiences:

1. Please comment on your general experience of the Postulant in the ministry site.
2. Does the Postulant show enthusiasm in her work? Give an example.
3. Does the Postulant exemplify positive work attitudes? Give an example.
4. Is the person willing to learn new ways to improve job performance?
5. How does she deal with pressure in the work environment?
6. How is the person in meeting work deadlines?
 - a. Are any areas of improvement with time management?
7. Additional Comments:

Work Supervisor: _____

Date: _____

Thank you for taking the time to complete this work review for Name of Postulant. Your input provides valuable feedback as I and our leadership reviews her ministry experience at this stage of the Postulant's formation journey.

(Signature of the Postulant Director)