

Are We There Yet?
A Road Map for Volunteer Formation

Catholic Volunteer Network
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Defining Formation...

☞ What comes to mind when you hear the word formation?

☞ What words does "formation" evoke?

**Defining Formation...
(in Echo)**

Echo formation identifies the Spirit as the primary agent in formation, capable of moving in every part of a person's life. Echo formators hope to support the Spirit by providing opportunities for volunteers to be engaged and challenged in Pastoral, Intellectual, Human, Communal, and Spiritual arenas.

Formators encourage volunteers to consider how these arenas relate to one another in order to prepare individuals to strive for and model a holistic ministry, as described in Co-Workers in the Vineyard of the Lord (USCCB, 2005).

Why Formation?



☞ Ecclesial ministers “need and deserve formation of high standards.” (Co-Workers, p.33)

☞ Formation shapes volunteers’ relationships with God, Others, and Self.

Why Formation?

...God



“If ministry does not flow from a **personal encounter and ongoing relationship** with the Lord, then no matter how ‘accomplished’ it may be in its methods and activities, that **ministry will lack the vital soul and source** needed to bear lasting fruit” (Co-Workers, p 38).

Why Formation?

...Others



☞ Formation prepares volunteers to navigate professional, communal, and personal relationships.

Why Formation? ...Self



☞ Formation provides a sacred space to attend to parts of self that are difficult to approach alone.

Personal Program Inventory



☞ **Purpose:** Take stock (or account) of the work in which you and the volunteers are already engaged. Consider where volunteer formation is already (or could be) included.

☞ **Pre-Inventory Questions:**

1. State your Program's Mission (goal/program description)
2. List your Program's "Pillars" (foundational dimensions)
3. Name the People involved (volunteers, staff, support team)

Personal Program Inventory



☞ **Instructions:** Consider all components of your program (what, when, why, who) and the role formation is already playing (or could play) in the ongoing work.

☞ **Questions to Consider:**

1. What events or activities do you prepare for annually?
2. When do these important events/activities fall during the year? How often?
3. Why are these events important? (What is the benefit for volunteers and staff involved?)
4. Who is involved? (age and demographic of volunteers and/or staff in question)

Post-Inventory Questions & Discussion

☞ Program-specific, Post-Inventory Questions

(See worksheet for 5 questions)

☞ Paired Sharing Discussion Questions:

1. *What was challenging about this exercise? What was fruitful or helpful?*
2. *Where were some of the gaps you noticed that could benefit from formation opportunities?*
3. *How do your program's pillars (or dimensions) inform your work? Do all of the pillars receive equal attention? Which ones seem to be emphasized? Neglected?*

Large Group Discussion

☞ Discussion Questions:

1. *What was challenging about this exercise? What was fruitful or helpful?*
2. *Where were some of the gaps you noticed that could benefit from formation opportunities?*
3. *How do your program's pillars (or dimensions) inform your work? Do all of the pillars receive equal attention? Which ones seem to be emphasized? Neglected?*

Best Practices



**CVN Conference Workshop: "Are we there yet?": A Road-Map for Volunteer Formation
Personal Program Inventory: Questions for Reflection**



Participant Name: _____

Program Name: _____

Pre-Inventory Questions:

1. Program Mission:

2. Program "Pillars" (foundational dimensions/elements):

3. People involved (volunteers, staff, support team):

**CVN Conference Workshop: "Are we there yet?": A Road-Map for Volunteer Formation
Personal Program Inventory: Questions for Reflection**



Post-Inventory Questions:

1. How do your program "pillars" inform or shape your volunteers' experience in the program?

2. Is any pillar in need of strengthening? *How have you come to discern or identify this need? Who or what helped you to name this area for growth?*

3. Looking at the "sketch" of your program from start to finish, where might there be a ripe opportunity for formation? *What existing parts of your program could be substantiated?*

4. What changes or revisions to your program arose? *Are any fundamental dimensions in need of evaluation? Name what may need to be added or let go.*

5. What are you doing well? What areas already incorporate volunteer formation? *How are your volunteers being changed by what you are doing well? (What experience of your volunteers can you give to support this?)*

Questions to consider for Paired-Share / Large Group Discussion:









1. What was challenging about this exercise? What was fruitful or helpful?
2. Where were some of the gaps you noticed that could benefit from formation opportunities?
3. How do your program's primary pillars (or dimensions) inform your work? Do all of the pillars receive equal attention? Which ones seem to be emphasized? Neglected?



Formation Best Practices

1. As a staff, name the **level of formation** that you will offer for your volunteers. Is each staff member comfortable with the privileged sharing and complexities that the work of formation involves?
2. Have your **application** itself reveal your program's **pillars** or **dimensions**, especially with regards to formation.
3. Assure that you can **help admitted applicants succeed** in your program. If you cannot accompany them in the ways they need, you should not admit them.
4. Always consider the **age** and **life stage** of your volunteers and **tailor** your orientation, instructions, and formation accordingly. (Consult stages of Development)
5. Set **clear expectations** with regards to formation and program requirements.
6. Discern when a volunteer is being **challenged** in a demanding but **life-giving way**, and when a volunteer is in a unhealthy environment.
7. Gather information! Regularly invite **input** and **evaluations** from your volunteers. Schedule in regular time for evaluation and processing after particular events, as well as for big-picture **vision** and **planning**.
8. Make time for **one-on-one conversations** between staff and volunteers.
9. Maintain a close connection between your **program pillars** and actual programing, while also reading the **signs of the times**.
10. Invite "**consultants**" from outside the program to support programing and expose volunteers to various experts with different perspectives. Consultants may include artists, spiritual directors, clinical psychologists, yoga instructors, contra callers, etc.
11. Treat the formation process as **sacred and confidential**, in a way that communicates that accompaniment of volunteers is a privilege.
12. Invest in **ongoing formation of the staff** with opportunities such as retreat days, staff development days, etc.
13. **Pray regularly** for your **volunteers, staff**, and the **program**.

Erik Erikson's Stages of Development

	Age		Crisis to Overcome	Virtue to be Attained	Description	Freudian Equivalent
Stage 1	0-1		Trust vs Mistrust	Hope	At this stage babies learn to trust that their parents will meet their basic needs. If a child's basic needs aren't properly met at this age, he or she might grow up with a general mistrust of the world.	Oral
Stage 2	2-3		Autonomy vs Shame & Doubt	Will	As toddlers, children begin to develop independence and start to learn that they can do some things on their own (such as going to the toilet). If a child is not encouraged properly at this age, he or she might develop shame and doubt about their abilities.	Anal
Stage 3	4-6		Initiative vs Guilt	Purpose	As preschoolers, children continue to develop more independence and start to do things of their own initiative. If a child is not able to take initiative and succeed at appropriate tasks, he or she might develop guilt over their needs and desires.	Phallic
Stage 4	7-12		Industry vs Inferiority	Competence	Throughout their school years, children continue to develop self-confidence through learning new things. If they are not encouraged and praised properly at this age, they may develop an inferiority complex.	Latent
Stage 5	13-19		Identity vs Role Confusion	Fidelity	When they reach the teenage years, children start to care about how they look to others. They start forming their own identity by experimenting with who they are. If a teenager is unable to properly develop an identity at this age, his or her role confusion will probably continue on into adulthood.	
Stage 6	20-34		Intimacy vs Isolation	Love	During early adulthood most people fall in love, get married and start building their own family. If a person is unable to develop intimacy with others at this age (whether through marriage or close friendships), they will probably develop feelings of isolation.	Genital
Stage 7	35-64		Generativity vs Stagnation	Care	This is the longest period of a human's life. It is the stage in which people are usually working and contributing to society in some way and perhaps raising their children. If a person does not find proper ways to be productive during this period, they will probably develop feelings of stagnation.	
Stage 8	65+		Integrity vs Despair	Wisdom	As senior citizens, people tend to look back on their lives and think about what they have or have not accomplished. If a person has led a productive life, they will develop a feeling of integrity. If not, they might fall into despair.	

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Selections from Co-Workers in the Vineyard of the Lord:
A Resource for Guiding the Development of Lay Ecclesial
Ministry
USCCB, 2005

Co-Workers on Spiritual Formation

Of the essential goals of spiritual formation for lay ecclesial ministers, *Co-Workers* states that such formation “aims to arouse and animate true hunger for holiness, desire for union with the Father through Christ in the Spirit, daily growing in love of God and neighbor in life and ministry, and the practices of prayer and spirituality that foster these attitudes and dispositions.” The document goes on to explain that “If ministry does not flow from a personal encounter and ongoing relationship with the Lord, then no matter how ‘accomplished’ it may be in its methods and activities, that ministry will lack the vital soul and source needed to bear lasting fruit. Nothing can substitute for true conversion and personal encounter with Christ. Spiritual formation cannot produce it, for it is God’s gracious gift; but spiritual formation can teach and help those who seek it, prepare them to receive it, and, when it is given, develop its fruits in their lives and ministry. This dynamic of spiritual growth is an essential component of formation for ministry (p. 38). Among the methods of spiritual formation included, the document lists the following: daily prayer and spiritual practices, retreats and days of reflection, spiritual direction, study of the lives of the saints, faith sharing and theological reflection, as well as the practice of justice and charity (p. 42).

Examples of Spiritual Formation:

- Annual retreats with rich theological themes (i.e. Trinitarian theology, Christology, Pneumatology, Ecclesiology, sacramental theology, moral theology, etc.) as well as wisdom from various spiritual traditions on living the mysteries of Christian faith
- Regular days of reflection and faith sharing within volunteer communities and supported by program staff
- Opportunities for regular spiritual direction and vocational discernment
- Shared experiences of service and justice with reflective components
- Opportunities for Eucharistic celebrations, for the celebration of the Sacrament of Reconciliation, and for sacramental and devotional practices
- Weekly gatherings for communal prayer and faith sharing within the context of intentional faith communities

Co-Workers on Human Formation/Human Development

Co-Workers in the Vineyard of the Lord suggests “Human formation seeks to develop the lay ecclesial minister’s human qualities and character, fostering a healthy and well-balance personality, for the sake of both personal growth and ministerial service.” Among the elements of human formation, the document includes the following: “a basic understanding of self and others; psychological health, marked by integrity and appropriate interpersonal boundaries; a mature sexuality; physical health, including overall balance and practices of wellness; understanding of family systems and dynamics; ability to learn from both praise and criticism; and the virtues of Christian discipleship” (pp. 36-37).

First on the list of the document’s identified methods of human formation is “participation in a small faith community,” which provides “opportunities for support and accountability.” The document clearly concludes that “Creating, guiding, and supporting small communities within formation programs furthers the work of human formation.” In addition, *Co-Workers* suggests that programs of human formation must provide ample opportunities for the following: affirmation and critique; periodic feedback in the form of peer review, mentor evaluations and recommendations; counseling and psychotherapy if necessary; and the development of habits of discernment, self-reflection, and self-awareness (p. 37).

Examples of Human Formation:

- Participation in intentional faith community with other volunteers
- Workshops, guidelines, resources and facilitated faith sharing on how to live in an intentional faith community
- Multiple opportunities for facilitated and spontaneous peer review, feedback, affirmation, and critique
- Seminars on human development topics such as integrity, balance, wellness, intimacy, communication skills, sexuality, and professional ethics
- Referral assistance for sustained counseling and psychotherapy

Co-Workers on Pastoral Formation/Professional Development/Theological Integration

Co-Workers in the Vineyard of the Lord defines the goal of pastoral formation, which is sometimes called professional ministerial development. The document explains, “Pastoral formation cultivates the knowledge, attitudes, and skills that directly pertain to effective functioning in the ministry setting and that also pertain to pastoral administration that supports direct ministry.” Included in the general skill set of those preparing for effective ministry (apart from the necessary theological and catechetical skills) are such elements as relationship and communication skills, skills of collaboration, gift discernment, volunteer management, basic counseling skills, conflict management, organizational development and administrative skills, as well as civil law and a ministerial code of ethics (pp. 47-49).

Co-Workers in the Vineyard of the Lord goes on to describe the proper methods of pastoral formation and to describe how theological integration is most likely to happen: “The knowledge, skills, and attitudes necessary for pastoral ministry may be taught in traditional classroom or seminar formats, but that is not enough. The teaching must be supplemented by practical experience in real situations and by mentored reflection on those experiences... The actual practice of ministry is a powerful occasion for ongoing formation and provides an invaluable opportunity for integration... Theological reflection upon such ministry practice makes possible ‘a general and integral process of constant growth and ensures active and harmonious integration based on pastoral charity’” (pp. 49-50).

Examples of Pastoral Formation

- Formal mentor relationship for each volunteer
- Evaluation and assessment by mentors and program staff
- Workshops on pastoral theology, theological integration, theological reflection, pastoral skills, and professional development

Co-Workers on Intellectual/Academic Formation/Theological Studies

Co-Workers in the Vineyard of the Lord speaks of the goal of the intellectual formation of lay ecclesial ministers, saying that they are “to develop an understanding and appreciation of the Catholic faith, which is rooted in God’s revelation and embodied in the living tradition of the Church.” They are to “engage in theological study for the sake of a broadened and deepened faith and a better-grounded and informed ministry... Thus, their faith, spirituality, and pastoral practice can be strengthened, and they will become theologically well-informed pastoral ministers: knowing the breadth of Church teaching and the richly varied theological tradition, and able to access and use these resources to meet the needs of ministry today” (p. 44). Areas of theology to be studied include “Sacred Scripture and its interpretation, dogmatic theology, church history, liturgical and sacramental theology, oral theology and Catholic social teaching, pastoral theology, spirituality, and Canon Law” (p. 46).

Examples of Intellectual Formation:

- Ongoing theological, pastoral, and catechetical workshops offered through partners diocese and professional associations
- Seminar style case studies which integrate theological reflection and ministerial praxis
- Theologically rich retreats and days of reflection, as well as opportunities for facilitated faith sharing