

## Guide for Formators Ignatian Associates

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In 2002 at an inter-community Congress, the entire Ignatian Associate community ratified our “Statement of Identity and Statement of Values.” Formation is one of our core values. The Statement of Value on Formation is provided here.

### **Statement of Value on Formation**

[17] The purpose of formation is to draw us into the life of Christ and bring us true freedom to serve others. Each Ignatian Associate commits to this lifelong growth process.

[18] Initial formation is a two-year process. It includes the Retreat in Daily Life and a study of the history, mission, and philosophy of the Jesuits and the Ignatian Associates. Formation deepens prayer, faith sharing, and reflection on apostolic activity as well as developing group intimacy and trust. In addition, formation emphasizes the Catholic Church’s teachings on social justice and the call to lay leadership and service. The study and discernment of the Promises of Simplicity of Life, Fidelity, and Apostolic Availability are integral. Hands-on apostolic experiences and prayerful reflection on the same are critical to Ignatian Associate formation.

[19] Formators are “Promised” Associates and Jesuits who have a background in Ignatian Spirituality/theology and interpersonal and group dynamics. They serve as companions/mentors to Associates in formation.

[20] Local communities will provide Promised Associates with ongoing formation opportunities including, but not limited to, retreats and theological reflection on apostolic activities and the Spiritual Exercises.

### **The Formation Team – for the 2 year Formation**

The Formation Team in each local community will consist of at least one Jesuit and at least one promised Ignatian Associate. The Formation Team members will ideally function in partnership in leading the group, but may adapt and/or delegate particular responsibilities according to their individual skills.

Inviting promised Associates or local Jesuits to join the Formation group to lead a particular discussion topic is recommended on occasion. The Formator(s) should brief the person being invited, and share the resources for that topic provided in this “Guide.”

Overall, the role of the Formation Team is to foster an atmosphere of trust and mutual respect among members of the Formation group. It is also the responsibility of the Formators to make every reasonable attempt to cover the material, so as to provide a

common base of understanding for each person completing the Ignatian Associates 2-year Formation program.

The Formators—both Jesuit and Ignatian Associates, are not spiritual directors for the group nor for any individual in the group. (They may or may not be qualified as spiritual directors.) Much of the time it is one of the Formators who will *facilitate* discussion, leading the spiritual conversation. It is vital that the rules of faith sharing are promoted and developed within the group. Distinction between “faith sharing,” “conversation,” and “discussion” is important.

In order to accomplish the goals for the Formation program, it is important that the Formators understand and accept their role and responsibility.

### Responsibilities of the Formation Team:

- Building the trust level of the group. A supportive group can be a tremendous asset to an individual engaged in making the retreat, which can often be a lonely and arduous experience. It helps just to know that others are making the same effort, and the benefits of the retreat are enhanced and deepened as individuals both learn to articulate their own experience, and listen to what others in the group are experiencing. There are ground rules which greatly assist in the growth of trust in a group. [See below, section on Initial Meetings.]
- It is the role of the Formator to teach and to reinforce the skills of faith-sharing, listening, and self-disclosure being developed. It will be helpful to distinguish different modes of group interaction. “Faith-sharing” is not the same as a “discussion” or a “spiritual conversation.” By “faith sharing” is meant an intimate, personal sharing of the ways one experiences (or fails to experience) God’s presence in prayer, relationships, and the events of daily life. The group receives, affirms, and reverences the speaker’s experience of God in a warm, respectful silence. “Discussion” is a verbal exchange surrounding certain ideas or concepts. There may be give and take, times when participants agree or disagree, even friendly argumentation during a discussion. By “spiritual conversation” is meant a discussion involving spiritual and theological ideas, concepts, and experiences. While it may include some content that overlaps with that of faith sharing, there will be some give and take, agreement and disagreement, etc. Experienced Formators will be able to move within these 3 modes, if necessary, in any one meeting. [Please refer to “Guidelines for Faith-Sharing” in the Appendix.] The previous experience of individuals in these activities is likely to vary widely within a particular group. The growth in the needed skills, for example, faith-sharing, will happen with patient, consistent practice within clearly defined parameters.
- Reinforcing key Ignatian concepts and processes. Since the retreat experience of each participant is so individual, it will be helpful if the formation team can draw forward some of the key moments of the retreat experience without implying that

any member's prayer is inadequate if they have not touched on them in that particular way. Regardless of how it manifests, the basic structure of the retreat should become more clear as the year progresses, and it becomes a source of richness to understand that the underlying themes and processes can be realized in a variety of ways. Occasionally some basic teaching will be required; all members should have a basic grasp of the principles of discernment, and know about key concepts and terminology of the *Exercises*, for example the "Principle and Foundation," the "Two Standards", etc.

- Identifying a spiritual director for each person. It is also important for the Formators to work with the Coordinator for the Ignatian Associates as needed, to identify a spiritual director for each of the persons who will be making a 19<sup>th</sup> annotation retreat. The spiritual director should be experienced in Ignatian Spirituality, qualified to direct a 19<sup>th</sup> annotation retreat, and able to make the necessary time commitment. Frequently, it is a good idea to change one's director for the purposes of the retreat.
- Inform the Coordinator of the identity and address of each person's director.
- Communicate with the Coordinator that each person has a director, and who it is. (The non-Jesuit directors should be instructed to send the invoices for their services to the Coordinator.)
- Communicate with all of the spiritual directors, including expression of gratitude to them, and supplying them with the proposed schedule for the group meetings. (Note, this may be done by the Coordinator; the Formators should let the Coordinator know if they will be doing this themselves, or would like the Coordinator to do the communication.)
- Request resource materials from the Coordinator. This may include ordering of texts for each person, or copies of articles for use by the Formators. (Please note that 2-3 weeks lead time is needed for ordering many texts. We are attempting to honor all copyright and related laws, and are seeking permission for photocopying of articles or sections of texts.)
- Clarifying one's role: Another important factor is that the Formation team members will be walking a difficult line between roles as facilitators of the meeting and as participating members of the group. It will be helpful if it is clear that when one team member is in charge, the others can participate more fully, both for his or her own benefit, and also as a role model for skills the group is practicing.

### Specific responsibilities in the First Year:

- The primary goal of the Formation Team in the 1<sup>st</sup> year is to support the making of the *Spiritual Exercises* by those in Formation. Above all, the Formators will continually remind each participant that the retreat process is of a very individual nature, and that it is not expected that they will have the same experiences as other participants or be on exactly the same assignments or schedule at any given time. Be attentive to the fact that it takes courage for group members to share their prayer and life experience with other people, especially as the other group members will likely be strangers to them at the beginning, and they may have little prior experience of faith-sharing or sharing in groups.

### Specific Responsibilities of the Formation Team in the Second Year:

- To deepen and enrich the experiences of the first year.
- To lead the group in the study of selected topics—including the history and pertinent current information about the Society of Jesus and the Ignatian Associates in the Wisconsin Province, and development of knowledge and skills of Ignatian Spirituality.
- Identifying a spiritual director for each person. The spiritual director might not be the same one who directed the person during their 19<sup>th</sup> Annotation Retreat the previous year.
- To bring each of the people to an understanding of who we are as Ignatian Associates, so that they can best discern whether or not they desire to make Promises and a commitment to being an Associate.

## **Selection and Training for Formators**

*[Note to reviewers: as of August 2003, this section(pg 7-8) remains “under development.” Suggestions are very welcome.]*

### **Sharing of Gifts with ones community...**

*[Note: need for community agreement that the Conservi have this role.]*

Formators come forward from the community, willing to share their gifts. The Conservi, as a whole group, will invite people to be members of a Formation Team based upon the recommendation from the Conservi from the particular local community. Those local leaders will be aware of the needs of a local community, the gifts which an individual has and is willing to share.

The Jesuit members of the Formation team do so out of their own generosity with respect to gift of time for the work, as well as the acknowledgement of the Provincial. The Conservi and/or the coordinator communicate with the Provincial regarding Jesuit companions (both in Formation and with the promised IA communities) whenever a change is necessitated.

Despite a willingness to serve the community as a Formator, it is recognized that not everyone has the skills which are helpful and needed in that role.

### **Skills of a Formator:**

*[This is not a comprehensive listing, nor is it humanly possible for any one individual to possess all of the qualities or characteristics. ]*

Ability to foster an atmosphere of trust  
Some understanding of group dynamics  
Knowing how to be a supportive person  
Ability to lead a discussion  
Ability to give clear explanations e.g. about faith sharing  
Ability to “teach” about the Exercises, explaining concepts  
Ability to model and reinforce good behaviors/practices with respect to faith-sharing, listening, self-disclosure  
Ability to honor/respect confidentiality  
Ability to assess behavior of those in Formation, and to make recommendation(s) to the Conservi regarding a candidate’s progress and fit within the community.

Attitude/affective skills: *[need additional listing]*

Attentiveness  
Openness to the Holy Spirit  
Prayerful

Selection and Training of Formators, continued:

Length of commitment for Formators – both IA and SJ

Term?? i.e. not a life-time appointment, yet there is value in remaining a Formator for more than 2 years...for both the person and for the community

Suggestion: perhaps not all Formators do both years, i.e. some might be better suited/skilled to facilitate the 1<sup>st</sup> year, and some the 2<sup>nd</sup> year. Expansion of the Formation “Team” concept to include this rotation in a given local community, also including best use of individual Jesuit skills.

Formator-in-training??

## **First Year Formation**

- **Goals**

- The primary work of the first formation year is making the *Spiritual Exercises* in the Annotation XIX or “Retreat in Daily Life format.” It is hoped that each person in Formation will develop a prayer life which includes daily prayer, and learn to work/journey with a spiritual director.
- Consistent with that overall goal, each person in Formation will be encouraged to develop skills in faith-sharing, listening, and self-disclosure. It is hoped that each person in Formation will be open and trustful in sharing.
- Each person will identify key Ignatian concepts (themes), and be able to verbalize them by the end of the year.

- **Suggested format for meetings**

The weekly meetings will ordinarily be two hours long. Participants are usually very busy people who have made this additional large commitment of their time and effort. It is reasonable to expect them to be present and on time. To encourage this, meetings should begin and end on time. Negotiate any departure from the normal schedule with the entire group. It may be suggested to participants that if they will be arriving late, or needing to leave early, that they communicate that with one of the Formators prior to that evening.

During the first year, the meeting will ordinarily be directed by one of the formation team members. The team will ideally plan jointly, and then each take primary responsibility for one of the sections of the meeting. This provides some interest and variety, and allows each team member to offer his or her particular strengths to the group.

### **-- Initial meetings**

The first two or three meetings of the group are crucial in establishing guidelines and setting a tone for the work which will follow. An atmosphere of relaxed attentiveness will be most helpful, with enough structure provided to move things forward in a purposeful way without conveying an attitude of rigidity or un-adaptability. It is important that those in Formation have quality time together (separately from an interaction or “social” time which they may have with members of the “promised” community.)

The first time the group meets, it is helpful to have a brief prayer exercise to help center and focus the group, and to make its purpose clear from the outset. Then the next most urgent business is to help the group members to introduce themselves to one another and to tell something about what has brought them to this formation process. [Allow adequate time for this; possibly 5-10 minutes per person.] The second part of this first meeting should then be spent on setting group expectations, and guidelines. The most important of these seems to be the following:

1. Confidentiality concerning personal content of group meetings. It should be clear that whatever information a person chooses to share with the group belongs to that person and should never be used without his or her express permission. The ground rule is that whatever is shared in the group stays in the group, and that it is not necessarily appropriate even for group members to bring up material introduced by another person in the meeting unless it is initiated in conversation by that person.

2. Everyone participates. It should be understood from the outset that everyone will be actively participating in the group meetings. At sharing time, everyone will share. It is entirely at the discretion of the individual what and how much is shared, and how this is done. In an extreme case, a person might share by saying they have nothing they feel free to talk about at that time, but at least they will have taken responsibility in and with the group for where they are at the time. It is very distracting to other group members and to the group process for certain individuals to remain silent; everyone keeps wondering what is happening with them. Further, the tone of the group is significantly different when each person is taking the risks and making the investment of sharing with the group.

3. Each person's space is respected. The role of the group in faith-sharing is to prayerfully and respectfully receive the communications of the other group members without entering into discussion about them. The greatest gift they can offer is to honor each person's experience by letting them be where they are. This means, for example, that if a person becomes emotional during sharing, that this should be held in reverence. If other group members rush in to rescue or console, it minimizes the person's experience by cutting it short and implying that it is not okay for the person to be vulnerable with the group. This is a hard discipline for many to learn, but the rewards are well worth the effort.

4. Housekeeping details. Group members should be welcomed to the meeting space and made familiar with its layout and any practical knowledge they need, for example, where the bathrooms are, any restrictions regarding access to the building, how to make the coffee, or whatever seems called for by the particular situation.

For the second meeting, it will usually be helpful (again following an introductory prayer) to give a brief introduction to the nature of the *Spiritual Exercises*, and to contemplative prayer. It is important that participants understand that they are making a Retreat, and praying the Exercises, as opposed to a "study" or a "course" in Ignatian Spirituality. A brief overview of the life of St. Ignatius is also recommended.

## -- Ongoing meetings

Perhaps the most useful overall structure for planning the meeting of the first year emerges from the overlay of the weeks of the *Exercises* on the events and rhythms of the church year. It will also be important that the Formators have a sense of where each participant is in the retreat at any given time. To some extent it is helpful to coordinate the group work around the retreat with the Church year even if it doesn't coincide directly with where some or all of the retreatants are just then. Praying together such events as the Annunciation, the Nativity, and early events in Jesus' life during the Advent and Christmas seasons, for example, will benefit the group even if they come to those events in their retreat a little earlier or a little later.

Social times, during which the Formation group gathers without any "agenda," is also an important way to build community. Sharing Eucharistic celebrations with the promised community is also encouraged.

- **Suggested Curriculum: Themes from the Spiritual Exercises  
Schedule for the First Year – A Guideline**

In any of the local communities, the calendar will probably allow for scheduling 16 to 24 formation group meetings (after the 1 or 2 "initial" times the Formation group is together.) Knowing that there are always changes to schedules, realistically, there would be at least a minimum of 15 gathering times. The **themes** suggested below are those which should be included for discussion during the 1<sup>st</sup> year of Formation. Time permitting, others can be added. This presumes an October thru mid-May schedule, with 2 "initial meetings" in September (as discussed above.) Based upon the number of meetings projected, each Formation team will need to plan so the eleven themes recommended will be presented to the group as a whole.

For each theme, there are references provided. These are intended for use by the Formators. Perhaps one of those references, or part of one for each theme might be selected to distribute to those in Formation, to help generate understanding and discussion. **In other words, this is in no way a "required reading list", but rather resources which may be helpful for the Formators in leading a discussion about a particular theme.**

This activity (reading and discussion) should not detract from the focus upon the fact that the 19<sup>th</sup> Annotation is prayer, not study. Nonetheless, as Ignatian Associates, it may be helpful to spend time with one's Formation group, discussing the themes as such. Those in Formation should also be reminded that regardless of the theme which is being discussed with the group, it is their individual director who will help them pay attention to the Holy Spirit, and proceed through the "weeks" of the Retreat at their own pace.

Appropriate Texts for the consideration of each of these themes may be found in the following three resources concerning the Spiritual Exercises:

Fleming, SJ, David L. Draw Me Into Your Friendship: The Spiritual Exercises, A Literal Translation & a Contemporary Reading. The Institute of Jesuit Sources, St. Louis, 1996.

Skehan, SJ, James W. Place Me With Your Son: Ignatian Spirituality in Everyday Life. Georgetown University Press, Washington, D.C., 1991.

Tetlow, SJ, Joseph. Choosing Christ in the World: A Handbook for Directing the Spiritual Exercises of St. Ignatius of Loyola According to Annotations Eighteen and Nineteen. The Institute of Jesuit Sources, St. Louis, 1999.

Since the Formators and Individual Spiritual Directors might prefer that the above resources be used by retreatants for retreat purposes only, several alternative resources are listed beneath each topic. These readings should expand or broaden the Formators and retreatants' understanding of each theme without repeating or interfering with retreat materials furnished by their individual directors. [A copy of each is in a central file in the Coordinator's office, and copies should be requested from the Coordinator as needed.]

**SUMMARY of Suggested THEMES for Group Meetings**  
**During the First Year of Formation (the 19<sup>th</sup> Annotation Retreat)**

1. Examen
2. The Principle and Foundation
3. Sin and the Great Struggle
4. A Sinner Loved by God – Accepting Forgiveness
5. The Call of Christ the King
6. The Incarnation & Birth of Jesus
7. The Two Standards – Jesus Strategy vs. that of the World (Baptism, Christ Tempted)
8. The Three Classes of Persons
9. Walking With Jesus Through the Passion and Crucifixion
10. Jesus Shares the Joy of His Resurrection
11. The “Contemplatio”
12. St. Ignatius’ Rules for the Discernment of Spirits
13. The Three Kinds of Humility
14. Jesus the Teacher with Words of Power and Light – Jesus Challenges Us
15. Jesus the Healer
16. Jesus Accepts Love and Gives Love – Intimacy with Christ
17. Jesus Sends His Followers to Spread the Good News

The following resources are suggested material which will help the Formator prepare. Selected articles or passages may be helpful to distribute to those in Formation for their reference—both now and in the future. [Copies of all resources are available from the Coordinator.]

**“Initial Meeting” Resources:**

- Traub, S.J., “Do You Speak Ignatian?” Monograph from Xavier University Press, 2001.
- O’Neal, S.J., Norman, “The Life of St. Ignatius,” Monograph from the Jesuit Conference.
- Byron, S.J., William J., Jesuit Saturdays, Loyola Press, 2000.

**RESOURCES for the First Year Themes:**

1. The Examen of Consciousness

- Hamm, S.J., Dennis, “Rummaging for God: Praying Backwards Through Your Day”, America, May 14, 1994. [File # 335]
- Aschenbrenner, S.J., “Consciousness Examen,” Review For Religious, Vol 31, No 1, Jan 1972. [File #336]
- Hellwig, Monika, “Finding God in All Things: A Spirituality for Today,” Sojourners, Dec 1991. [436]
- Hauser, S.J., Richard, “Finding God in Daily Life,” Creighton University Window publication, Winter 1995-96. [435]
- Govan, S.J., John, “The Examen—A Tool for Wholistic Growth” [431]

2. The Principle and Foundation

- Shea, John “Exceeding Darkness and Undeserved Light,” an edited essay from Stories of God by John Shea, Resources For Christian Living, 1978. [File # 201]
- Merton, Thomas “On the Oneness of All Human Beings.” An excerpt from Conjectures Of A Guilty Bystander, Bantam Doubleday Dell Publishing. [202]
- Georgen “The Father’s Love Revealed,” IN: The Power Of Love, Resources For Christian Living, 1979. [203]
- Bondi, Roberta, “Friendship With God,” Reprint from Augsburg Fortress of Minneapolis. [File 204]
- Bush, Bernard “I Have Called You by Name,” Reprint by Affirmation House Press. [205]
- Groeschel, Benedict “The Call of God,” Chapter 1 IN: Spiritual Passages: The Psychology of Spiritual Development, Crossroad Publishing, 1984. [206]

## **RESOURCES for the First Year Themes**

### 2. The Principle and Foundation, continued

- Silf, Margaret. Inner Compass. Chapter 1 or 2, Loyola Press, 1999. [ISBN # 0-8284-1366-9]
- Hopkins, S.J., Gerard Manley, “God’s Grandeur”

### 3. Sin and the Great Struggle

- Maguire, Daniel C. “A ‘New’ View of Sin: Our Growing Awareness of Social Evil.” [File #207]
- May, Gerald, “Addiction and Grace,” A chapter IN: Addiction and Grace, Harper Collins Publishers, 1988. [208]
- Georgen. O.P., Donald, “The Power of Sin,” A chapter IN: The Power of Love, Resources For Christian Living, 1978. [209]
- Silf, Margaret. Inner Compass. Chapter 3, Chapter 9, Loyola Press, 1999.
- Milton, John “Paradise Lost”
- Alison, James, The Joy of Being Wrong, Part 1, pg 7-21; Part 2, pg 22-63; Part 5, pg 139-161, and Part 9, pg 237-268, Crossroad Publishing, 1998. [ISBN# 0-8245-1676-1]

### 4. A Sinner Loved by God – Accepting Forgiveness

- Tillich, Paul, “You Are Accepted,” A chapter IN: The Shaking of the Foundations, Charles Scribner’s Sons, 1948. [File #210]
- Van Breeman, Peter, “The Courage to Accept Acceptance,” IN: As Bread That Is Broken, Dimension Books, 1974. [211]
- Nouwen, Henri. The Return of the Prodigal Son. excerpts from Chapters 2, 3, 5, & 6 \_\_\_\_

### 5. The Call of Christ the King

- Greeley, Andrew. The Jesus Myth. Chapters 2 & 3 \_\_\_\_
- Hamm, S.J., Dennis, “The Kingdom Meditation, A call to an irresistible campaign?” Jesuit Journeys, Autumn 1998. [367]
- Nolan, Albert. Jesus Before Christianity. Chapters 3, 4, 5, & 6 \_\_\_\_
- Shakespeare, William, Henry V

### 6. The Incarnation & Birth of Jesus

- Perhaps a guided meditation expanding on St. Ignatius birth narrative would be helpful here.
- Eliot, T.S., “Journey of the Magi”

**RESOURCES for the First Year Themes, continued:**

7. The Two Standards – Jesus Strategy vs. that of the World (Baptism, Christ Tempted)
  - Nolan, Albert. Jesus Before Christianity. Chapters 7,8,9, &10 \_\_\_\_
  - Silf, Margaret. Inner Compass. Chapter 11, Loyola Press, 1999.
  - “A Prayer of a Chance: Taking Evil Seriously” (An interview of Gordon Cosby, pastor of Church of the Saviour in Washington, D.C., by Jim Wallis, editor of Sojourners in 1986) [File # 212]
  
8. The Three Classes of Persons
  - Crosby, Michael. Spirituality of the Beatitudes. Chapter 3 \_\_\_\_
  
9. Walking With Jesus Through the Passion and Crucifixion
  - Harrington, O.P., Wilfrid, The Tears of God, 1992. [File #213]
  - Cassidy, Laurie, “Contemplating the Crucified: A Woman’s Reflection”  
\_\_\_\_
  - Hellwig, Monika, “The Dynamics of Tragedy in the Death of Jesus,” a chapter IN: Jesus, The Compassion of God. [214]
  - Nouwen, Henri. The Return of the Prodigal Son. pp. 121-133 \_\_\_\_
  
10. Jesus Shares the Joy of His Resurrection
  - Hellwig, Monika, “The Resurrection of Jesus and the Imitation of Christ,” a chapter IN: Jesus, The Compassion of God. [215]
  - Owens, S.J., Bernie, “An Easter Story,” 1967. [216]
  - Crosby, Michael. Spirituality of the Beatitudes. Chapter 9 \_\_\_\_
  
11. The “Contemplatio”
  - Buckley, Michael, “The Contemplation to Attain Love,” The Way Supplement, Vol. 24, Spring 1975 pp 92-104. [File # 217]
  - Hauser, Dick, “Responding to the Spirit: the Heart of Ignatian Spirituality,” Living The Ignatian Way, Summer 1995. [218]

**RESOURCES for Additional themes for presentation and discussion, as time permits during the year:**

*Please note that these do not need to be presented in any order. The numbering here, and above, is to provide for a point of reference for discussion among members of the Formation teams and/or with the Coordinator.*

12. St. Ignatius' Rules for the Discernment of Spirits

- Silf, Margaret. Inner Compass. Chapters 4, 5, & 6

13. The Three Kinds of Humility

- Metz, Johannes. Poverty of Spirit
- Arrupe, Pedro, "Falling in love" quote
- Crosby, Michael. Spirituality of the Beatitudes. Chapter 3

14. Jesus the Teacher with Words of Power and Light – Jesus Challenges Us

- Hellwig, Monika, "The Preaching of Jesus and the Reign of God"
- Crosby, Michael. Spirituality of the Beatitudes. Any Chapter

15. Jesus the Healer

- Nolan, Albert. Jesus Before Christianity. Chapter 4
- Vanier, Jean, "A Wound Deep in Man's Heart"
- Guided meditation using a Gospel passage where Jesus heals

16. Jesus Accepts Love and Gives Love – Intimacy with Christ

- Guided meditation with the raising of Lazarus (I have a meditation that places the pray-er in the role of Lazarus in the present.)
- Nolan, Albert. Jesus Before Christianity. Chapters 17

17. Jesus Sends His Followers to Spread the Good News

- Arrupe, Pedro, "Life's Prospects for the Young People of Today"
- Belote, Suzanne, "Living the Truth"
- Nolan, Albert. Jesus Before Christianity. Chapter 19

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Some general reference articles:

Maruca, S.J., Dominic, "The Graces of the Third and Fourth Weeks", in Soundings: A Task Force on Social Consciousness and Ignatian Spirituality, Center of Concern, 1973-74.

Rohr, OFM, Richard, "Why Does Psychology Always Win?" in: Sojourners, Dec 1991 [Topic: dependence upon God]

- **Discernment of continuing to Second Year**

There needs to be a focused period towards the end of the first year for individuals to reflect on the experiences of the retreat and the group year as a whole as they reaffirm their desire to stay with the program for the second year, or process a sense that it is not best for them to do so.

#### Recommendations to Conservi

The Formators should meet with the local Conservi in each community, sharing their assessment, which would include expressing any concerns they have about someone continuing, and recommending withdrawal if necessary. It is recommended that the Formators and Conservi meet approximately every 6 months so that Formators can keep the Conservi informed regarding how things are going, as well as whether or not each person should be invited to make promises.

The 2-year Formation is a period of mutual discernment—for both the individual and for the community (represented especially by the Formators and also by the Conservi.)

#### Summer

At this time, the Formation group will also have to make decisions as to how often, when, and to what purpose they will meet during the summer. It is good to maintain some continuity with the Formation group, but this is a time when many people need to be out of town or engaged in other activities, so a more relaxed meeting schedule and even an irregular one, may be well advised.

This may also be a time for experimentation with other forms of ministry, or with visiting apostolates which provide a particular challenge or opportunity. [Please refer to the section on Apostolic Activity or Pilgrimage Experience.]

#### Transition to 2<sup>nd</sup> Year

Along with clear understanding of meeting times during the summer, it is also helpful to establish a date on which the second formation year officially begins, and to plan a particular social event, retreat, or other mark point for this new beginning. Second-year formation normally begins in September and runs through May.

#### Annual Pre-Promises Retreat

Those completing their first year of Formation are encouraged to attend the annual Retreat and the Promises Liturgy. Once the group comes together in the Fall, it is good to give the group some reflective time for sharing the fruits of the retreat taken as a

whole, as well as any pilgrimage experience, and to encourage them to articulate this within the context of their own life histories and to make some statement as to where this leaves them at the present time.

### **Apostolic Activity and/or Pilgrimage Experience**

In terms of Formation Curriculum, the Apostolic Activity could be viewed as an “independent study.” The person in Formation – in consultation with their own spiritual director and the Formators, designs his/her own goal. Possible questions for the person include: Where are my growth edges?” “What are my hungers, my desires?” “What am I being called to do in ministry?”

The grace for which to pray is one of increasing one’s **trust in God** through this experience. Ignatius speaks of “pilgrimage” and of “experiences” for those entering the Society of Jesus. These include the making of the *Spiritual Exercises* and an actual pilgrimage experience—during which today the novice is sent out for a month with a one-way bus ticket and \$35. The other “experiences” which Ignatius describes in the *Constitutions* include these: 1) to serve in a hospital [66]; 2) to provide humble service to the house [68]; and 3) to explain Christian doctrine in public, i.e. teaching catechism [69]. It is the attempt to combine those ideas of Ignatius into what here is referred to as an “apostolic experience,” and to do so, as Ignatius writes “in accordance with the times, places, and capacity of each.” [70]

The summer between first and second year of formation may provide the opportunity to focus on some sort of spiritual pilgrimage experience, that is to say an experience which challenges the particular Associate in formation in an area of his/her life which needs attention and growth. Immersion experiences with the developmentally disabled, the elderly, the poor, children, and other cultures may be considered. Decisions about pilgrimage experiences are made by the local formation team and the individual Associate. Pilgrimages may be week-long, intensive experiences or extend throughout the summer, or even continue into the 2<sup>nd</sup> year. The primary goal of the pilgrimage is to grow in one’s radical dependence on the Lord. Associates are encouraged to share their pilgrimage experiences with each other.

Regardless of the options chosen –from those provided here or determined in some other manner, it is considered essential that there is reflection upon and sharing of the Apostolic Experience. Suggestions for this sharing include the following:

- Preparation of a 1 page summary of ones experience  
The writing down of the experience, and ones reflections upon it should be encouraged during and shortly after the experience. Distilling the experience to a

on-page document—which will be shared with the others in Formation, should explore “what I have learned--” will force the person to synthesize.

- Scheduling of an evening (or two, depending upon the number of people in the Formation group) in which each person can share her or his experience. The written summaries would have been distributed prior to this evening, so that all could be better prepared to listen to one another. The oral presentation could include the high points, the low points, who did you meet? How did those people affect you? Could you still pray?

## **Hands-on Apostolic Experiences During Formation**

“Hands-on apostolic experiences and prayerful reflection on the same are critical to Ignatian Associates formation.” -- Ignatian Associates Statements of Values

Although this has always been the least standardized portion of the 2-year formation program, the communal discernment leading up to the Ignatian Associates’ Statement of Identity and Statement of Values in May of 2002 reaffirmed it as integral in preparing those in formation to be apostolic people. For reasons which will become clear as you read through the historical background information we are providing, we think it best to leave the exact form these apostolic experiences take up to the discretion and discernment of the Formators, and, as appropriate, the individuals in formation. [Please refer to the Appendix to this Guide, Section C-2.]

### **Non-Exhaustive List of Approaches for Integrating Hands-on Apostolic Experiences Into the Summer or the Second Year of Ignatian Associates Formation**

1. “Long Apostolic Experiment” – a one-year commitment to a regular (at least 2 hours a week or 8 hours a month) apostolic activity serving/being with some marginalized group (economically disadvantaged, HIV positive, incarcerated individuals, mentally ill, mentally retarded, physically handicapped, illiterate, immigrants with poor English skills, elderly, etc.)
2. “Short Apostolic Experiment” – a short term commitment to apostolic activity – possibly only a ministry of presence due to the short term nature – with one of the marginalized groups mentioned above. This could take the form of a day-long, weekend, or week-long immersion experience. (Examples include shadowing a prison chaplain, running a Special Olympics event, a week of repair work on an Indian reservation or in Appalachia, immersion in a L’Arche community,

- homeless shelter or drop-in center, elder day care center, etc.)
3. “Pilgrimage Experience” – a journey to an unfamiliar environment designed to increase trust in and reliance on God or to challenge an isolated world view. This may depend on the financial resources of an individual or an Associates Community. Possibilities include spending one week to a month in a tough inner city area, on an Indian reservation, in Appalachia, in an economically underdeveloped country among the poorest of the poor (Africa, Mexico, South America, Asia). Jesuit networks can help – Jesuit Volunteer Corps and Jesuit Provinces in the US, Jesuit Refugee Services and Jesuit Provinces abroad, plus other Church networks such as parishes with twinning relationships (often involving group visits) with “Third World” parishes.
  4. “Extension of Current Apostolic Commitments” – making a decision to “stretch” by reaching out to a marginalized group or stepping out of one’s comfort zone and relying on God’s providence in ministry in a new and significant way.
  5. “Serious, Guided Reflection on One’s Current Apostolic Commitments” – [Bernie Owens, SJ sent me a packet outlining a program called “Finding God in the Workplace. It involves reflecting on how one’s current work situation fits in with one’s own values and with Christian values. Besides observing and praying about the current situation, one is asked to reflect on how the situation could be changed to become more consistent with the Reign of God. It would be a wonderful process for someone who considers their current work to be their apostolate. It does, however, require a large time commitment, perhaps only slightly less demanding than a 19<sup>th</sup> Annotation Retreat.]
  6. “Group Apostolate” – All associates in formation would be asked to make a commitment to some sort of group apostolate (specifics might differ from individual to individual as time and talent allow). This could be an on-going Ignatian Associate or Jesuit apostolate or other Church or social work project. The community in formation could go through a discernment process for choosing a group apostolate as outlined in the yellow book.

**These possibilities can be used in any combination the Formators deem appropriate. The Formators could make a decision to offer only one or two of these options to a particular formation group, or they could present all six and guide the individuals through a discernment process to make individual choices. Time for reflection on and faith sharing surrounding the apostolic experiences chosen is essential.**

## **Second Year Formation**

- **Goals**

- To deepen and enrich the experiences of the first year. The second year will continue to incorporate both individual and shared prayer, sacramental life, faith sharing, and development of interpersonal relationships and group identity. Group members will still commit to daily prayer and spiritual direction, though director meetings will more likely occur on a monthly, rather than a weekly, basis.
- To reach a greater level of intimacy and trust within the group. Having been together for one year, group members should be expected to share freely and regularly with each other, within and outside of the context of the meetings. They should be challenged regarding the growth of the group as a whole, helped to identify and deal with the routine stages of group development, and encouraged to move beyond politeness to loving candor with each other.
- To learn about the Society of Jesus and St. Ignatius of Loyola, the Ignatian Associates in the Wisconsin Province of the Society of Jesus, and Ignatian Spirituality. Activity will include discussion focused upon key documents.
- For each person to have an integrated knowledge of the *Spiritual Exercises*, Ignatian Associate identity, and history and documents through a commitment to apostolic experience.
- To consider, reflect upon, and discuss the promises of Simplicity of Life, Fidelity to the Gospel and to our Jesuit and Ignatian Associate companions, and Apostolic Availability. It may be profitable to introduce these early in the year in broad terms, so there time to appreciate their richness and complexity, and so that group members can consider how they resonate in their own lives. Then they should be reintroduced towards the end of the year with the focus specifically on the upcoming promises decision: what does it mean to promise simplicity of life, fidelity to one's companions, and availability--both individually and as this particular group of Ignatian Associates?
- To begin to assimilate into the promised community, both getting to know the people better, and understanding what community life means for Associates.

- **Suggested formats for meeting**

In one of the initial meetings of the second year, some time should be provided to talk about the annual retreat, with time for sharing the fruits of the retreat taken as a whole, and to encourage them to articulate this within the context of their own life histories and to make some statement as to where this leaves them at the present time.

In the initial meeting(s) of the second year, there needs to be clarification of expectations for the work of the year with an explanation of the usual way of proceeding, and a schedule of meeting topics and expectations regarding assigned reading should be explained. Housekeeping assignments for the year can also be made. For example, on evenings when only the Formation group is gathering, there may be a schedule for leading an opening prayer, and for bringing refreshments.

It is suggested that sometimes reading aloud short passages from selected readings will encourage good discussion. While at times it will be necessary to have people read some of the documents prior to coming together, it may be helpful to occasionally read passages together.

Inviting speakers--both Jesuit and promised Associates--to lead discussion on particular point is recommended. The role of the Formator is to insure that the key topics suggested in this "Guide" is presented to each person in Formation, and to pay attention for and to listen for the "integration" of the knowledge and prayer.

The two-part two-hour meeting format may continue to work well for the second year. Time for faith-sharing should be regularly included in the schedule. However, periodically, more interaction with members of the promised community will be planned, in addition to joining them for Eucharistic liturgy. Near the end of the 2<sup>nd</sup> year, attending any scheduled "community meetings" is also encouraged.

- **Suggested Curriculum: Topics for Consideration  
by Ignatian Associates  
Schedule for the Second Year– A Guideline**

The following topics should be addressed during the second year of Ignatian Associate Formation. There are three broad topics: The Society of Jesus, Ignatian Associates, and Ignatian Spirituality. Within each of these is listed several points which should be covered. Some will be briefly discussed, others will probably be considered in depth.

The Formation Team may wish to outline a schedule at the beginning of the year, so that those in Formation will have a general idea of topics to be covered. Some may best be covered via reading, some by discussion, some by prayer. It is not necessary to take these in the sequence listed below.

This “Guide for Formators” provides some resources—including written references, videotape, and internet/website materials. As with the resourced for the 1<sup>st</sup> year, it should be stressed that this is NOT a reading list for those in Formation. It is, rather, a Guide for the Formators, resources which will help you to prepare to lead a discussion on a particular topic. Some topics and resources are considered essential “background” and “foundational” and each person should have a copy, e.g. the Documents of Vatican II, or Decree 13 from General Congregation 34, and our Statement of Identity and Statement of Values.

**SUMMARY of TOPICS for Group meetings**  
**During the Second Year of Formation:**

## **Society of Jesus (Jesuits)**

### 1. History of the Society

By the end of the year, each person in Formation should have some familiarity with the life of St. Ignatius, and with the early history of the Jesuits. Points for discussion include:

- a. Ignatius of Loyola
- b. Early Companions
- c. Mission/purpose/characteristics of the Society of Jesus
- d. Constitution/Ways of Proceeding
- e. Short history of the Society of Jesus

### 2. Present Day

It is important that Ignatian Associates understand some of the current organization and issues facing the Society of Jesus. If we truly want to “walk with” The Jesuits, then it is important that we have this basic understanding.

- a. General Congregation 31, 32 & 34: Impact on the Society of Jesus
- b. The leadership of Pedro Arrupe
- c. Today’s Jesuit martyrs and their companions
- d. Society of Jesus in the US (Provinces/US Assistancy)
  - 1) The missions/apostolates of the Wisconsin Province
  - 2) Wisconsin Province Priorities
- e. Ministry and works of today’s Jesuits

## **Ignatian Associates**

By the completion of the Formation period, each person will have an understanding of the meaning of the Promises which we make, their rooting in Baptism (and, therefore, who we are as Church), who we are as Ignatian Associates, and how our local communities function.

### 1) Promises

- a. Meaning of the three promises: simplicity of life/fidelity/apostolic availability
- b. Putting the promises into practice
- c. Discernment about the promises

### 2) Background documents

- a. from Vatican II—Role of the Laity in the Church
- b. GC 34: Decree 13—Cooperation with the Laity in Mission

- 3) Foundational documents
  - a. Identity Statement/Statement of Values
- 4) History of the Ignatian Associates in the Wisconsin Province
- 5) Aspects of Associate Community Life
  - a. Being an Ignatian Associate—local community life
  - b. Associates around the world and Other Lay-Jesuit bonding experiments

### **Ignatian Spirituality**

Each of the following might be considered “skills” insofar as they require practice, but they may also be considered “concepts.” They have meaning for Ignatian Associates, and are essential. It is possible to cover multiple concepts in one meeting.

1. Examen
2. Discernment of spirits/decision making
3. “Finding God in all things”
4. “For the greater glory of God”
5. “Magis”
6. “Being a person for others”
7. “Preferential option for the poor”
8. “Contemplatives in Action”
9. Christ as a model of peace

## **RESOURCES for the TOPICS FOR THE SECOND YEAR:**

Please note that, as for the Resources listed for the First Year, this is not in any way intended to be a “reading list” for those in Formation, or even for the Formators. It provides a range of resources from which the Formators may choose to prepare him/herself, and to make carefully selected assignment for reading to the group, in preparation for discussion of the suggested Topics.

*Please further note that the outline numbering does NOT imply a sequence nor a priority. The numbering is to provide a point of reference for discussion among members of the Formation Team and/or with the Coordinator.*

*Topics and Documents which are considered “essential” and beneficial for every Ignatian Associate to be familiar with are indicated by an asterisk (\*) preceding the listing.*

### **Society of Jesus (Jesuits)**

#### **1. History of the Society**

##### **a. Ignatius of Loyola**

##### **Books include:**

- da Camara, Luis Goncalves, Ignatius of Loyola: Spiritual Exercises and Selected Works , edited by George Ganss, S.J, Paulist Press, 1991. ISBN# 0-8091-3216-8.
- Lonsdale, S.J., David, Eyes to See, Ears to Hear: A Companion to the Spiritual Exercises of Saint Ignatius , Loyola Press, 1990. Chapter 1: Images of Ignatius
- Byron, S.J., William, Jesuit Saturdays: Sharing the Ignatian Spirit with Lay Colleagues and Friends, Loyola Press, 2000. Chapter 1: The Man Who Was Loyola
- O’Malley, S.J., William J., The Fifth Week, \_\_\_\_\_
- Idigoras, J. I. Tellechea (Translated by C.M. Buckley SJ Ignatius of Loyola: The Pilgrim Saint, Loyola University Press, 1994. ISBN # 0-8394-0779-0.

##### **Articles include:**

- Hellwig, Monica, “Finding God in all Things: A Spirituality for Today, Sojourners, Dec. 1991.
- Patterson, Margot, “Chivalry Inspired a Courtier Saint”

- Gooley, S.J., Laurence L., To Walk With Christ: Praying with the Spiritual Exercises of St. Ignatius, See Appendix on: Ignatius of Loyola

Videos include:

- Ignatius Loyola: The Story of the Pilgrim, Michael Bellafiore, SJ
- Shared Vision: Jesuit Spirit in Education, Institute of Jesuit Sources

Internet /Computer sources include:

- [www.creighton.edu/CollaborativeMinistry/online](http://www.creighton.edu/CollaborativeMinistry/online)  
Click on spirituality resources— then on “The Pilgrim Page, then on the top square (biographical information)
- On Ignatius ~  
[http://www.jesuit.org/sections/sub.asp?SECTION\\_ID=187&SUBSECTION\\_ID=215](http://www.jesuit.org/sections/sub.asp?SECTION_ID=187&SUBSECTION_ID=215)

b. Early Companions

- O’Malley, S.J., John W., The First Jesuits, Harvard University Press, 1993.

c. Mission/purpose/characteristics of the Society of Jesus

d. Constitution/Ways of Proceeding

- \* “The Deliberation of the First Fathers” IN: Making an Apostolic Community of Love by Futrell S.J., John Carroll, Institute of Jesuit Sources, St Louis 1970. Appendix I.
- deJaer, S.J., Andre, Together For Mission, Institute of Jesuit Sources, 2001
- The Formula of the Institute, Notes for a Commentary by Antonio de Aldama, S.J., Institute of Jesuit Sources, 1990.

d. Short history of the Society of Jesus

- History within the Wisconsin Province  
<http://www.jesuitswisprov.org/whowe-are.html>
- On Jesuit History ~  
[http://www.jesuit.org/sections/default.asp?SECTION\\_ID=192&SUBSECTION\\_ID=252](http://www.jesuit.org/sections/default.asp?SECTION_ID=192&SUBSECTION_ID=252)

## Society of Jesus (Jesuits)

### 2. Present Day

#### a. General Congregations 31, 32 & 34: Impact on the Society of Jesus

Page references for documents from the General Congregations are based upon use of the following two publications:

Documents of the 31<sup>st</sup> and 32<sup>nd</sup> General Congregations of the Society of Jesus, Prepared by the Jesuit Conference and edited by John W. Padberg, S.J., Institute of Jesuit Sources, 1977. (ISBN # 0-912422-26-2)

Documents of the Thirty-fourth General Congregation of the Society of Jesus. Edited by John L. McCarthy, S.J., Institute of Jesuit Sources, 1995. (ISBN # 880810-19-0)

- GC 31
  - Decree 1—The Mission of the Society of Jesus Today (pp 67-72)
- GC 32
  - Decree 2—Jesuits Today (pp 401-405)
  - Decree 4—Our Mission Today: The Service of Faith and the Promotion of Justice (pp 411-438)  
This decree is the one that is often cited as having transformed the identity and ministry of the Society of Jesus.
- GC 34
  - Decree 2—Servants of Christ’s Mission (pp 25-38)
  - Decree 3—Our Mission and Justice (pp 39-48)
  - Decree 26—Characteristics of Our Way of Proceeding (pp 235-244)

#### b. The leadership of Pedro Arrupe

- Arrupe, Pedro, SJ One Jesuit’s Spiritual Journey: Autobiographical Conversations with Jean- Claude Dietsch, S.J., Institute of Jesuit Sources, St Louis, 1986
- Arrupe, Pedro SJ, Recollections and Reflections of Pedro Arrupe, S.J., (translated by Yolanda T. DeMola, S.C.) Michael Glazier, Inc., Wilmington Delaware, 1986.
- Chittister, Joan, OSB “Pedro Arrupe: The Face of Gentle Strength” A Passion For Life: Fragments Of the Face of God (with Icons by Robert Lentz), Orbis Books Maryknoll, NY, 1996. ISBN # 1-57075-318-0.
- Father Pedro Arrupe, SJ Servant of God 1907-1991 {Monograph}

- Bishop, George, Pedro Arrupe: Twenty-eighth General of the Society of Jesus Gujarat Sahitya Prakast, Gujarat, India, Institute of Jesuit Sources, 2000
- Nangle, Joe, OFM “Pedro Arrupe: The Other Basque,” Sojourners, December 20, 1991.

c. Today’s Jesuit martyrs

- Brackley, Dean SJ “Remembering the UCA Martyrs: Ten Years Later” Conversations, Fall 1999 . pp7-17
- Letter from Bert Thelen, SJ 1990
- Carney, James SJ (Padre Guadalupe ) To Be Christian is to be a Revolutionary”
- Mawhinney, S.J., John, “Salvadoran Martyr Remembered After 25 Years,” National Jesuit News, Feb 2002. (Rutilo Grande)
- Creighton website www.creighton.edu/CollaborativeMinistry/online  
Click on El Salvador Martyrs, Romero
- Jesuit Saints and Blesseds of the Society of Jesus  
http://www.geocities.com/francischinchoy/sjsaints.htm

d. Society of Jesus in the US (Provinces/US Assistancy)

- 1) <http://www.jesuit.org>
- 2) The missions/apostolates of the Wisconsin Province
  - A Brief History of the Society of Jesus and the Wisconsin Province (brochure prepared in 1991)
- 3) Wisconsin Province Priorities [Refer to the Appendix, Section B]

e. Ministry and works of today’s Jesuits

- Suggestion: “My Favorite Jesuit”—Discussion
- Kolvenbach, S.J., Peter-Hans, Letters on: Creative Fidelity [File 227], Ongoing Formations [228], Community Life [229]
- Copies of talks from Province Days, 2003 (when available.)

## Ignatian Associates

### 1. Promises

#### a. Meaning of the three promises

##### ~ In General:

- \* Ignatian Associates Companions Booklet
- Tetlow, S.J., Joseph, “Postmodern Asceticism: Creative Fidelity and Community Life”
- Cowan, CSJ, Marion, “Ignatius’ Vision for the 21<sup>st</sup> Century,” Lecture given at Ignatian Spirituality Conference at St Louis University 1999.

##### ~ Simplicity of life

- Chittister, OSB, Joan, “Simplicity” New Designs: An Anthology of Spiritual Vision, Benetvision Erie Pennsylvania 2002 pp 119- 126
- Kavanaugh, S.J., John, “Following Christ in a Consumer Society, The Spirituality of Cultural Resistance, “ Orbis Books, Maryknoll”

##### ~ Fidelity to the gospel, other associates and the Society of Jesus

##### ~ Apostolic Availability

#### b. Putting the promises into practice

- Experiential
- History of Apostolic Activities

#### c. Discernment about the promises

### 2. Background documents

#### a. Vatican II—Role of the Laity in the Church

##### Vatican II Documents:

- “Apostolicam Actuositatem” (The Apostolate of Lay People)
- “Gaudium et Spes” (Church in the Modern World)
- \* “Lumen Gentium” (Constitution on the Church)

- b. GC 34: Decree 13—Cooperation with the Laity in Mission
    - \* GC 34: Decree 13 (Cooperation with the Laity in Mission)
    - IA “Yellow Book”: Bert Thelen SJ “Jesuits and Collaboration” pp1-4
    - Hellwig, Monika “Ignatian Spirituality for the Laity” Lecture at Ignatian Spirituality Conference, St Louis University 1999.
3. Foundational Documents
- \* Ignatian Associates of the Wisconsin Province of the Society of Jesus “Statement of Identity and Statement of Values”
4. History of the Ignatian Associates in the Wisconsin Province
- Thelen, S.J., Bert, “A New Sense of Community: Jesuits and Collaboration,” CMSM Forum, Spring 1999 [Also copied in IA “Yellow Book”, pp1-4]
  - “New Wineskins: Lay Association with the Society of Jesus, Companions, January 1992. [Also copied in IA “Yellow Book,” p5]
  - Ignatian Associate History in the Wisconsin Province [See Appendix C]
5. Aspects of Associate Community Life
- a. Being an Ignatian Associate
    - Discussion led by Coordinator during visit to the community:
      - Companioning
      - Role of the leadership
      - Expectations
      - Committees/finances
  - b. Associates around the world
    - Papers from the Rome meetings (Bert/Sharon/Ruth/Tetlow publications)
      - Review of Ignatian Spirituality, “Friends in Mission”, Vol. 96, 2001.
      - Review of Ignatian Spirituality, “Exercises and Partnership”, Vol. 99, 2002
    - Jesuit Curia website  
<http://www.sjweb.info/articles/index.cfm>

## Ignatian Spirituality

1. Examen / Prayer
  - Hamm, S.J., Dennis, “Rummaging for God: Praying Backward Through Your Day,” America, May 14, 1994. pp 22-23
  - Rice, S.J., Dick, “Looking for God in Unlikely Places,” Jesuit Journeys, Summer 1997.
  - Vogelwede, S.J., Robert, “Daily Prayer in Modern Life,” IN: Accompaniment Edited by James E. Ewens, Ignatian Task Force Press, 1991.
  - Aschenbrenner, S.J., George A., “Consciousness Examen,” Review For Religious, Vol 31, No 1, Jan 1972.
  - Hamm, S.J., Dennis, “Praying Through Your Day: A Format”
  - [Unknown Author, Creighton Campus Ministry] Handout on Prayer, Forms of Prayer, Contemplation, and Meditation. [File #233]
  
2. Discernment of spirits/decision making
  - Wright, Wendy, “Passing Angels: The Arts of Spiritual Discernment” Weavings
  
3. ”Finding God in all things”
  - Hellwig, Monica, “Finding God In All Things: A Spirituality For Today,” Sojourners, Dec 1991. [File # 436]
  
4. ”For the greater glory of God”
  
5. *Magis*
  
6. ”Being a person for others”
  - Arrupe, S.J., Pedro, “Men for Others: Education For Social Justice and Social Action for Today,” Address at 10<sup>th</sup> International Congress of Jesuit Alumni in Valencia, Spain, July 31, 1973.
  - Padberg, S.J., John, “Ignatian Spirituality in Men and Women for Others,” Lecture at Ignatian Spirituality Conference, St Louis University, 1999.
  
7. ”Preferential option for the poor”
  - Untener, Kenneth, “How Should We Think About the Poor?” St Anthony Messenger, 1992.
  - Day, Dorothy, “The Meaning of Poverty,” Ave Maria Magazine, Dec 3, 1966.
  - McNulty, S.J., T. Michael, “Justice for the Poor is Central to Catholic Life,”
  - Kolvenbach, S.J., Peter-Hans, “The Option for the Poor in the Face of the Challenge of Overcoming Poverty,” Address given in Caracas, February 1998.

- Jones, John “Thinking About Poverty: Christian Perspectives”
- Sobrino, S.J., Jon, “The Human Family in the Face of Disaster”
- Coffey, Patrick, “A Pilgrimage to El Salvador: A Personal Reflection,” 1999.
- Anderson, S.J., Tom, “Walking with Christ in the Slums of Manila,” Jesuit Journeys, Autumn 1998

8. ”Contemplatives in Action”

- Fleming, S.J., David, “Growing as a Contemplative-in-Action,” Part I: Imagination and Contemplation; Part II: Contemplation and Discernment, Jesuit Bulletin, Spring/Summer pp. 10-11, Fall pp. 12-13.

9. Christ as a model of peace

- Vanderhaar, Gerard A., Beyond Violence: In the Spirit of the Non-Violent Christ, Twenty-third Publications/Bayard, Mystic, Connecticut, 1998. ISBN# 0-896-22-739-1.

## **Third Year and Beyond – ongoing formation for Promised Associates**

Acknowledge that continuing formation is needed. Beyond the scope of this manual. But people who are in the 2-year formation program should hear that it continues as promised members...

**IGNATIAN ASSOCIATES  
WISCONSIN PROVINCE  
OF THE SOCIETY OF JESUS**

**Statement of Identity**

[1] Ignatian Associates are lay Catholic women and men—single and married. We are apostolic people connected in prayer and work, drawn to the poor and vulnerable as we experience the healing presence of Christ. We are formed by the Spiritual Exercises, rooted in Ignatian Spirituality, and connected with the mission of the Society of Jesus. Gratefully we are responding to our experience of God’s constant healing and love.

[2] After a formal period of formation, we commit to Promises of Simplicity of Life, Fidelity to the Gospel and to our Associate and Jesuit Companions, and Apostolic Availability. To grow as promised people, we gather regularly within our local communities as well as meet periodically with the entire membership to share the fruits of our prayer, to encourage one another in our ministries, and to support each other in living out our Promises.

## IGNATIAN ASSOCIATES

### ***Statement of Values***

[3] As Ignatian Associates, we have identified seven core values that shape us. The following Statement of Values reflects our belief of who we are and how we function.

#### **Apostolic Life**

[4] Ignatian Associates are apostolic in that we work toward building the Reign of God. Desiring to enrich who we are as "called and sent people," we promise Apostolic Availability. Centered in Ignatian Spirituality, we strive to live a faith that gives witness to Christ's Word and work in the world, a faith that evangelizes culture, promotes justice, and exercises a preferential love for the poor and outcast in our society and throughout the world.

[5] First and foremost, Ignatian Associates strengthen and deepen holy and existing commitments regarding baptism, marriage, family, community, and work. This also encompasses parenting children and developing our families to see God in all things while respecting each and every human being as a gift of God.

[6] In addition, we have been committed, and some of us missioned, to individual and community apostolic projects that promote the Reign of God in the universal mission we share with the Society of Jesus, and indeed, with the entire Church. Time, talent, treasure, and prayerful discernment about human needs and how these might be addressed determine how individual and communal projects are shaped.

[7] Community apostolic projects bring members together in a special way through a common focus on apostolic work in prayer. Though active participation in individual Associate communities varies according to the circumstances of a project and makeup of a specific community, all Associate members prayerfully support their communal projects.

#### **Relationship with The Jesuits**

[8] The Ignatian Associates include lay women and men inspired by the gift of Ignatian Spirituality and the mission of the Society of Jesus, which guide our individual and community lay apostolic ministries. We value being lay companions who walk with

## APPENDIX

members of the Society of Jesus in our efforts to live the Gospel through our daily lives. We are grateful for the spiritual and financial support offered by the Wisconsin Province, and we wish to acknowledge the graced history of the development of the Ignatian Associates. The Ignatian Associates emerged from and continue to exist out of an ongoing desire to connect lay people more deeply to the mission of the Society of Jesus. We were invited in 1991 by the Provincial to begin an experiment in “lay-Jesuit bonding,” and we are supported by the Society as it works to implement Decree 13 from General Congregation 34. In seeking to live in an Ignatian manner, we offer mutual support to each other and our Jesuit companions as we endeavor to find God in all things and live for the greater glory of God.

### **Family Life**

[9] Family life, understood in the broad context of married and single life and encompassing all ages, is a core value for all Ignatian Associates as we attempt to live it to the fullest. A faithful commitment to our primary relationships indeed becomes a foundational expression of our Promise of Apostolic Availability.

[10] As we support each other in fulfilling our family life commitments and participate in family gatherings, such as sacramental celebrations or seasonal events, we strengthen our Ignatian Associate communities and give witness to all around us.

[11] We grow in the fulfillment of this core value through formation and, most particularly, through sharing our family life stories as experienced in all forms and at intergenerational stages.

### **Community Life**

[12] We are apostolic and prayerful in our focus. As a community, the Ignatian Associates grow in faith and love through commitment to regular prayer, spiritual direction, retreats, the Eucharist, reflection, and the daily examen of consciousness. We nurture the awareness of God's abiding love.

[13] Coming together gives us support to discern freely how the gifts of our lives are calling us to participate in God's ongoing creation. This encourages us to live out our Promises. We create and participate actively in the Ignatian Associate community through communal prayer, faith sharing, apostolic works, community decisions, social gatherings, and family activities. We assist each other in discerning important ministerial and vocational decisions through consultation and prayer. Our communities support our apostolic and collaborative work with the

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Jesuits and value hospitality and relationships with local and distant Associate and Jesuit communities. We review with each other and our spiritual directors our commitment to God through the Ignatian Associate community.

### **Membership**

[14] As Ignatian Associates, we desire to expand our membership and grow as apostolic, faith communities. Invited to membership are Catholic adults who desire to love and serve God as a primary purpose of one's life in a communal context, in association with the Jesuits. Members possess the freedom to commit themselves to being a person for others. Members have gifts and talents for collaborative service. Zeal, open-mindedness, and a generous nature are other qualities that characterize their lives. Members possess an ability or potential to live in cross-cultural contexts and are open to formation and other learning experiences.

[15] The screening process for beginning formation takes place in the local community and utilizes:

- a letter of intent from the candidate;
- three letters of reference, including ideally one from a Jesuit, another from a spiritual director (if the candidate has one) or from an Ignatian Associate (if the Ignatian Associate is the person from whom the candidate learned about the Ignatian Associates);
- interviews with at least two Ignatian Associates and one Jesuit companion; and
- a behavioral assessment by a trained Promised Associate or professional.

[16] Because we engage in a serious commitment of time as well as spiritual and emotional resources, the norm for married candidates is for the couple to be invited to formation and admitted to Promises together. After formation, the term of membership is one to three years, as expressed in the length of one's Promises.

### **Formation**

[17] The purpose of formation is to draw us into the life of Christ and bring us true freedom to serve others. Each Ignatian Associate commits to this lifelong growth process.

[18] Initial formation is a two-year process. It includes the Retreat in Daily Life and a study of the history, mission, and philosophy of the Jesuits and the Ignatian Associates. Formation deepens prayer, faith sharing, and reflection on apostolic activity as well as developing group intimacy and trust. In addition, formation emphasizes the Catholic Church's teachings on social justice and the call to lay leadership and service. The study and discernment of the Promises of Simplicity of Life, Fidelity, and Apostolic Availability are integral. Hands-on apostolic experiences and prayerful reflection on the same are critical to Ignatian Associate formation.

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[19] Formators are “Promised” Associates and Jesuits who have a background in Ignatian Spirituality/theology and interpersonal and group dynamics. They serve as companions/mentors to Associates in formation.

[20] Local communities will provide Promised Associates with ongoing formation opportunities including, but not limited to, retreats and theological reflection on apostolic activities and the Spiritual Exercises.

### **Leadership**

[21] Ignatian Associate leadership is an expression of service and an extension of the Promises. The leadership of each local community consists of two local leaders who serve for two-year overlapping terms. Leaders are promised members selected by local communal discernment. They are aware of the multiplicity of talents in the community and able to tap those gifts for communal benefit. An Associate leader is willing and able to accept the various roles required for the spiritual health and livelihood of the community.

[22] Together, the Associate leaders from each community form a leadership group called the Conservi (literally, “Fellow Servants”). Conservi cultivate the vision of Associate identity. In consultation with Ignatian Associates and Jesuits, they invite applicants to formation, invite candidates to make the Promises, select the formators, and form a point of contact with the public and the Jesuits.

[23] Ignatian Associates have a coordinator who works for and reports to the Conservi on the daily activities of the communities. This person provides necessary support to the Conservi and individual Associates as well as a link between Associates and the Provincial and his staff. The coordinator has an essential and valued role in fostering inter-communal relationship.

[24] Local leaders provide weekly community organization and planning to foster an environment that nurtures living out the Promises. They communicate the content of Conservi meetings to the local community. Local leadership responsibilities include pastoral and personal support by assisting members in their personal discernment of apostolic ministries and offering annual conversations with individual members relative to a review of community life and participation in it.

[25] All members of the Ignatian Associates are called to leadership responsibilities, which include accepting tasks coordinated or delegated by the local leaders.

### Guidelines for Faith Sharing

For Ignatian Associates, regular sharing of our lives and the activity of God in them is a key dimension of our experience in community. Like other spiritual practices of promised Associate life (regular spiritual direction, daily examination of consciousness, annual retreat and the companioning process), faith sharing helps us to recognize the leadings of God in our lives, in the company of trusted others. Not only do we share our own experiences in faith sharing; we are also privileged to see God's work in on another's lives, over an extended period of time.

In order for our faith sharing to bear fruit, it is important to feel a certain comfort in the Associate community, and this means that members of the group come to faith sharing with similar expectations. Very often good and faithful people can hurt or misunderstand one other, simply because they have not articulated what they expect of themselves and one another. What follows are some guidelines for faith sharing. They are meant to promote, not restrict, our community life as Associates, and should be adapted, as the community desires.

- ◆ **Faith sharing is an opportunity to reflect on one's life in the light of God.** It is not a mere review of one's calendar (the last week, month, etc.), but an effort to notice the movements of the Spirit in everyday life. So, rather than rattle off all the activities of my week, I might take note of a few that are especially significant, and ask myself what God might be saying to me through those experiences (see attached article on the Examination of Consciousness).
- ◆ **In faith sharing, each person in the group simply comments on the topic at hand from his or her own experience, speaking in random order. Normally there is no response to what the other person(s) has said unless a question is asked for purposes of clarification.** For instance, if someone states, "I don't think I trust God enough," the group should not respond, "Oh yes, you do, much more than you think!" The person's statement needs to be accepted without response, argument or discussion. This listening posture should not become so rigid that it communicates as coldness, however. A hurting member of the group may need a hand on the shoulder, an encouraging word, offers of prayers, etc. Care and respect for the other person is the guiding principle.
- ◆ **Confidentiality is maintained in the group.** What is said in faith sharing is not repeated outside the community.
- ◆ **Each member of the group speaks at random. If a group member chooses not to share with the group on a given night, s/he should make the group aware that s/he is passing.** Sometimes groups can sit in silence for extended periods, waiting for someone to speak -- or read into silences messages that are not there. Conversely, no one is forced to speak in faith sharing on a particular night.
- ◆ **Faith sharing emanates primarily from the heart rather than the head.** While our emotions and intellect are deeply connected, and God works with us through both, faith sharing is not an occasion for academic analysis, lecturing or philosophical/theological exposition. It is an experience of sharing from our own interior -- especially the emotional and spiritual -- how God seems to be working with us, even if we do not fully understand it.

- ◆ **Silence is as much a gift as words.** Silences between the faith sharing of members are opportunities to allow what has been said to touch our hearts.
- ◆ **Listening well is part of being faithful to each other.** Am I really paying attention to what you are saying, or planning my own remarks? Do I talk too long on a regular basis, keeping others from sharing? Do I accept the feelings of others as legitimate, without becoming judgmental? Faith sharing means listening well.
- ◆ **Let God lead the group.** Some occasions of faith sharing are serious, others are light. Within the group, members may have radically different experiences to share. Allow God, not rules or assumptions, to determine what the faith sharing will be like. Prayer and a sincere, loving heart are the two most important ingredients.

## **A Short History of Apostolic Experiences During Ignatian Associate Formation**

### Initial Formation Group – Milwaukee – Summer of 1993

After completing the 19<sup>th</sup> Annotation Retreat, this first formation group had some initial discussions about who they were becoming as Ignatian Associates and what their vision for continuing was. It became clear that individuals in the group had two main visions. One group was interested in continuing the support and encouragement we gave one another through faith sharing, in order that we might continue to grow spiritually and in living out our baptismal promises. A second group had come to Ignatian Associates with the dream of sharing in the apostolic mission of the Society of Jesus. It appeared that the vision of the first group would hold sway, and several members of the second group discerned, with regret, that they would not be able to continue in the formation program. While they, too, valued the support and encouragement they received through faith sharing, they found it hard to justify spending that much time away from family if there was to be no commitment to the mission of the Society of Jesus – which is, of course, building the Reign of God.

Fr. Bert Thelen intervened to remind them that the whole purpose of the experiment had been apostolic. The group refocused the second year of formation on ministries with the poor and marginalized, and many were able to move forward towards making promises of simplicity, fidelity, and apostolic availability with renewed joy and enthusiasm. In order to provide time for apostolic work the formation group chose to meet for faith sharing and discussion around topics in Jesuit history and Ignatian spirituality (see second year curriculum) bi-weekly instead of weekly. Each associate made a commitment to an “apostolic experiment,” spending roughly 8 hours a month working with the poor or marginalized. Each individual, with the help of the community, formators, Church and social work networks, researched and discerned an appropriate ministry. Some couples chose to serve in a ministry together, some even with the involvement of their children.

### Second Formation Group – Omaha – Summer of 1995

There were as yet no formal guidelines for formation of Ignatian Associates other than an initial year making the 19<sup>th</sup> Annotation Retreat. The Milwaukee Group focused on defining the promises of simplicity, fidelity, and apostolic availability. They even developed a Charter which was clearly mission-focused. (See yellow book.) To their astonishment, the Omaha formation group announced that they had decided not to do “that apostolic thing” in the second year. Since they had not been required to follow the Milwaukee community’s program, and everyone was still trying to listen to the Holy Spirit and see where this Ignatian Associates experiment would lead, they were allowed to proceed as they thought best.

In future years, there was some discussion as to whether the omission of a formal apostolic component to Ignatian Associates formation in Omaha made it more difficult for new associates to grasp the concept of apostolic availability. Although this remained

their tradition in formation, many promised members share the apostolic spirit of the Milwaukee Group. Examples include the Leacock's Computers for Africa program, Laura Weber's commitment to Nativity Jesuit Middle School's summer camp, etc.

Subsequent Formation Groups – Milwaukee – 1995 to the present

Most (all?) formation groups continued to have a hands-on apostolic aspect, although the exact form differed from year to year.

At times, the formators assigned each associate-in-formation a “pilgrimage experience.” Modeled after the pilgrimage which Jesuit novices make directly following their 30-day silent retreat, it typically involves an immersion into completely unfamiliar surroundings in order to foster trust in and reliance on God. It may have involve a journey, immersion in another culture, a decision to spend a significant amount of time with the poor and marginalized, etc. [Steph, help me here.]

At other times, the formation community committed themselves to involvement in a Group Apostolate. (See yellow book.)

Twin Cities Formation Community – (year?-present)

[I need you to write a few lines about this one, Martha. Has there been any hands-on apostolic component to date during Formation in the Twin Cities? If not, was there any intentional reflection on and sharing of individuals' on-going apostolic commitments?]

*During the Ignatian Associates' threaded bulletin board in the fall of 2001, it became clear that the Formation subgroup would need to address this issue of whether hands-on apostolic activity should be included during the initial 2-year Formation period. The following report summarizes the small group communal discernment surrounding hands-on apostolic activities. It is presented as an aid to formators as they discern the type(s) of apostolic experience(s) which seem most appropriate for a particular group of Associates in Formation.*

### **Formation – Supplemental Group Report**

Participants: Sharon Bramante, Terry Brennan, Martha Conway, Donna Eddy, Ruth Leacock, Stephanie Russell

We have already included the key elements of Formation in our Statement of Values and refer you to that document.\* These elements were readily agreed to during our first set of communications. Two major questions arose:

1. Should formation include some sort of apostolic experience? and
2. Should the Associates develop a flexible core curriculum to be used in all three communities?

We conducted a group discernment process to answer the first question. Following is a summary of the reasons against and for.

#### Against including an apostolic experience during formation:

1. Ignatian Associates in Formation may find one more time commitment burdensome.
2. Since there seems to be some consensus that an Apostolic Experiment only makes sense if it flows out of the graces of the Spiritual Exercises, we will lose the flexibility and efficiency of our current “rolling admission” policy.
3. People come to Ignatian Associates with varied backgrounds; some have a well developed prayer life prior to beginning this journey -- some have been haphazard and need to focus on becoming solidly grounded in their daily contact with God before looking at taking on activities; as Americans, mastering the skill of being "Contemplatives in Action" may require that we master being contemplative -- we have the action part down pat.
4. Not all three communities have "ready-made" activities that lend themselves to including the formation group -- I loved what the Milwaukee formation folks were able to do with participating in Casa Romero (as a most recent example) -- but not all communities have that.
5. Some people in formation are already involved in apostolic activities and may not be able to add another activity to their already loaded lives.

6. It may be more important to help people see clearly how "what they are already doing" is apostolic -- or could become more so -- rather than add another layer of involvement that may or may not be meaningful for what that person sees as his/her purpose in life.
7. Picking an activity to meet a "requirement" may result in activities that feel artificial and less than meaningful for the individual.
8. "Requiring" the activity, rather than a thorough prayerful discernment about current apostolic ministry (the why and how I proceed) might actually be working against what God wants the individual to do.
9. Participation by membership will be (by history) spotty and uneven, fostering resentments and making community more difficult. (This refers to a group apostolate model where everyone is required to participate in the same apostolic activity.)
10. Reception by and usefulness to those "served" is compromised by the "experimental" nature - we are serving to meet our own needs, not those of the community in which we live. (Refers to the need to be sensitive to those we serve – not just seeking personal growth.)

For including an apostolic experience during Formation:

1. A willingness to engage in some sort of apostolic endeavor seems to flow from the graces of the Spiritual Exercises. "Love ought to manifest itself in deeds rather than in words." (St. Ignatius)
2. People learn in a variety of ways. Much of Ignatian Associate Formation involves reading, prayer, reflection, faith sharing, and discussion. A "hands-on" apostolic activity would provide variety and a concrete learning experience.
3. As Associates in Formation explore concepts such as mission, preferential option for the poor, and the promotion of social justice, an apostolic experience which places them in direct contact with the poor or marginalized would be invaluable. We may learn more from being with and listening to people than from reading about them.
4. If the addition of an apostolic component to Formation is carefully developed, there may be great potential for individualization. (An apostolic experience can be chosen which will fit the needs of the individual in terms of time & talent, perceived growth edges, desires & callings.)
5. Even if Associates (and perhaps especially if) choose a wide variety of apostolic experiences, it would provide a golden opportunity for sharing and mutual support.
6. It could provide the person in formation with an opportunity to experience the reality of apostolic activity--which would be helpful as the individual is discerning about making promises of availability; although many people in formation may be (and probably are) involved in several forms of apostolic activity, some individuals may profit from an opportunity to a) clarify what they are already doing and be invited to stretch themselves out of their comfort zone, b) rethink or revise their choices of service or c) identify an area of service/apostolic action which had not been previously considered.

7. It would bring apostolic activity into the forefront of each person's thinking--either in the form of "what could I do that I have never done before" or "what could I do with greater commitment/love/connectedness/etc"

8. I think that having people in formation exploring apostolic opportunities might be a gift to the Promised group--who would perhaps serve as mentors, support people--and who could very well be introduced into "what more" they themselves might need to consider.

After much prayerful reading of one another's comments, the following suggestion was made:

Re the issue of apostolic activities in formation, perhaps we could take some sort of middle road--i.e. offering a range of possibilities to the person in formation depending on where he/she is in that area. In other words, for the person who has already become involved in activities, perhaps the focus needs to be about how to go deeper into that apostolate or whether that apostolate is what the person is being called to. On the other hand, for the person who cannot identify an apostolic activity, perhaps experiencing a short term apostolic activity might be of benefit in helping to determine whether the person is able to make the Promises.

In light of the Ignatian Associates' core value to be apostolic people, we recommend that an apostolic experience be part of the second year of formation (after the Retreat in Daily Living). We judge that the positives can be maximized and the negatives minimized if the apostolic activity is chosen through an individual discernment process in consultation with the formators. A list of possibilities might be included in the flexible core curriculum. Later discussion among group members focused on the value of a communal dimension to discernment, and we concluded that the "BIN" Companioning Discernment Process which Pat Russell developed might be appropriate. The associate in formation could choose two promised associates to listen and pray with him/her as he/she discerns an appropriate apostolic experience.

We decided we already had consensus on the second question -- should we develop a flexible core curriculum -- so we recommend a committee be formed to take care of that project. The background to the question was the recent realization that Formation, while containing certain key elements across the three communities, was conducted in a fly-by-the-seat-of-your-pants style. With no formal preparation, formators often had to search out and create their own materials and expressed a desire for more guidance. We felt it was important to have some uniformity between communities, but believe the formators should also have some flexibility in the choice of materials and activities. This will enable them to tailor formation to the group they are working with.

Other suggestions which came up were:

Taking a look at the purpose of ongoing formation. Our "preamble" outlines a fairly good general purpose for formation. There was a suggestion that the goal be Appendix – Section

that everyone become qualified to “give” the Spiritual Exercises. We decided the rigor and commitment necessary to train spiritual directors might not be appropriate for ongoing formation, which has tended to be informal with a minimal amount of homework. It might, however, be interesting for individual communities to set modest goals for their ongoing formation. The Milwaukee community, for example, has chosen to review and deepen their understanding of the 4 weeks of the Exercises over a 2-year period.

1. Whether Ignatian Associate Formation should more directly and explicitly mirror Jesuit Formation. We decided there are already many parallels, and the addition of other elements might prove burdensome given the commitments of a lay person. (We are, for example, expected to support ourselves and our families financially during formation.)

In summary, as a result of our group discernment process, we present the following recommendations to the full Ignatian Associate Community:

1. That formation include some formal hands-on apostolic experience. (Possibilities: Being with the poor, trying a new ministry, reflecting on current or past apostolates. Hands-on apostolic experiences would be chosen through an individual discernment process in consultation with the formators and other Associate companions. The “BIN” companioning process is a possible model.)
2. That a flexible core curriculum be developed to aid formators as they mentor/companion new Ignatian Associates.
3. That some formal training be extended to the formators.
4. That an orientation packet which would help prospective Associates, family members, etc. understand who we are be developed.

We believe the Ignatian Associate Formation process is already working quite well. There seem to be core values across all three communities. We think the next step is a discussion as to whether the full community wishes to adopt our prayerful recommendations.