

SOCIETY OF ST. VINCENT DE PAUL



VINCENTIAN FORMATION GUIDELINES

Revised: March 2020

Forward

These Vincentian Formation Guidelines reflect our continued focus on the spiritual growth and practical knowledge of our Vincentians.

Vincentian Formation is the initial and ongoing process of growing and developing in the tradition, charism and spirituality of the Society of St. Vincent de Paul. Formation touches the head and the heart of the members, assisting each one to find meaning and purpose, love, and a sense of relatedness. Vincentian Formation thus enables the fulfillment of the three essential elements of the Society: Spirituality, Service and Friendship. Its importance is regularly reflected in SVDP-USA's national strategic plan.

The Society's commitment to recruiting and retaining Vincentians requires us to evolve our orientation and ongoing formation and training to meet the current and emerging needs of Councils and Conferences. Expanding to new parishes, welcoming Vincentians with diverse ethnicities and languages, and engaging youth and young adults, are all exciting opportunities. The **National Formation Team** is accountable for developing new programs and materials to support these evolving needs.

Roles

This document outlines several specific roles that assist in Vincentian Formation. Many Conferences and Councils may already have Vincentians performing some of these functions, but under different titles. By using standard titles and organization going forward, our One Society will be better able to deliver formation programs, and support formation teams.:

- **Formation Coordinators:** These individuals have the broadest role, ensuring that Vincentians in their geographic area have access to trained spiritual advisors, Ozanam Orientations, and a variety of formation materials and events that meet the needs and desires of the local Society.
- **Spiritual Advisors:** These individuals have special responsibility for the spiritual development of Vincentians in their group. In addition to assisting with formation events and distributing resources, Spiritual Advisors offer a prayerful, mission-focused presence.
- **Ozanam Orientation (OO) teams:** The Society's keystone formation workshop is supported by three roles:
 - **OO Leaders** facilitate the overall planning of Ozanam Orientations in their geographic area, with an eye to increasing quality, access, and attendance. They ensure the training and support of OO Formators and Presenters. They must also be OO Formators.
 - **OO Formators** plan, manage, and help to deliver Ozanam Orientations in their geographic area. They are experts at the logistical preparations, technology setup, and content. OO Formators know how to present every section of the Ozanam Orientation.

- **OO Presenters** know how to present one or more sections of the Ozanam Orientation. Unlike OO Formators, they do not (yet) have the capability to present every section or to coordinate all other aspects of the event.

Organizational Structure

While the particular circumstances of each local area may dictate certain adjustments, the following chart summarizes the ideal configuration of formation roles at various organizational levels:

	Formation Coordinator	Spiritual Advisor	OO Leader	OO Formators	OO Presenters
Conference		✓			
Council (Arch)diocesan and/or District	✓	✓	✓	✓	✓
Region	✓	✓	✓		

Implementing the New Guidelines

Strengthening Spiritual Advisor Formation and Training at all levels of the Society will be essential for the Formation Guidelines to be hardwired in the society. All Regions will be evaluating their current formation support for Spiritual Advisors and taking advantage of updated training materials. The National Formation Team supports each Region as they assess their current delivery system for OO and Continuing Formation and Education. Many regions already have Formators dedicated to OO, and Regional and (Arch)Diocesan Council Formation Coordinators (titles vary regionally) supporting the significant ongoing formation needs of all Vincentians. Other regions focus their Formators almost solely on the OO program with fewer resources available for ongoing formation and education. **The ultimate aspiration is to strengthen BOTH orientation and ongoing formation and education.** Our Servant Leaders at all levels play a pivotal role in supporting the spiritual flourishing of all Vincentians by putting into practice the new Formation Guidelines.



VINCENTIAN FORMATION GUIDELINES

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I

VINCENTIAN FORMATION COORDINATOR GUIDELINES



ROLES AND RESPONSIBILITIES

REGION AND COUNCIL

Formation of Members

“It is essential that the Society continually promote the formation and training of its members and Officers, in order to deepen their knowledge of the Society and their spirituality, improve the sensitivity, quality and efficiency of their service to the poor and help them be aware of the benefits, resources and opportunities that are available for the poor.” (Rule: 3.12)

INTRODUCTION

Vincentian Formation

Vincentian Formation is the initial and ongoing process of growing and developing in the tradition, charism and spirituality of the Society of St. Vincent de Paul. Initial and ongoing formation touches the head and the heart of the members, assisting each one to find meaning and purpose in life, love and a sense of relatedness. Vincentian Formation thus enables the fulfillment of the three essential elements of the Society: Spirituality, Service and Friendship.

Strategic Plan (2018-2021)

Goal II of the Strategic Plan calls the National Council to,

“Encourage and Support Vincentians on their Spiritual Journey”:

- **Celebrate our essential element of Vincentian spirituality**
- **Enhance the formation, and grow the number, of spiritual advisors at all levels in the Society**
- **Increase opportunities for Vincentian spiritual formation**

To respond to this challenge the National Council offers Vincentian Spirituality and Formation Materials and programs, such as:

- **Serving in Hope**, a formation guide and video resource:
 - Module I: Our Vincentian Vocation**
 - Module II: Our Vincentian Spirituality**
 - Module III: Our Vincentian Heritage**
 - Module IV: Our Vincentian Mission**
 - Module V: Our Vincentian Rule**
 - Module VI: Our Vincentian Conference Life**
 - Module VII: Our Vincentian Home Visit**
- **Spiritual Advisor** formation and spirituality resources
- **National Ozanam Orientation Program**, the basic formation program for all Vincentians offered to every active and associate member of the Society.
- The following committees offer workshops and resources:
 - **Systemic Change**
 - **Voice of the Poor**
 - **Diversity/Multicultural Issues**
 - **Youth and Young Adults**

THE REGIONAL FORMATION COORDINATOR

A. Selection and Approval:

- Selected by the Regional Vice President, after consultation and approval of the National Formation Chair.
- Must be an Ozanam Orientation Formator
- Will have a minimum of three years as an active member and a willingness to grow in an understanding of the:
 - Charism of the Society and Vincentian spirituality.
 - History, life and spirit of the Founders.
 - Vincentian Formation programs in the Vincentian Pathway **(Attachment A)**
 - Process of adult formation and the experience of working in groups.
 - Importance of communication and presentation skills.
 - Use of computers and other technology.
- Will attend the Invitation For Renewal.

B. Responsibilities:

- **Create a Regional Vincentian Formation Committee:**

The purpose of the Vincentian Formation Committee is to create and implement a Regional Formation Plan to promote the growth and development of the tradition, charism and spirituality of the Society of St. Vincent de Paul in the Region, Councils, Conferences and Special Works. The Committee consists of the Regional Formation Coordinator, Regional Spiritual Advisor, a Council/Conference Spiritual Advisor, the Regional Ozanam Orientation Leader and a Council Ozanam Orientation Leader. In addition to these members, other people with additional skill sets may become a part of the Committee.
- **Create a Regional Vincentian Formation Plan:**
 - Collaborate with the National Vice President for the Region and Formation Committee to create the Regional Vincentian Formation Plan, and assist Councils and Isolated Conferences to develop and implement their own Formation Plan.
 - Guide and teach the Vincentian Pathway. **(See Attachment A)**
 - Work with Councils to assure an active, trained Spiritual Advisor for every Conference and Council
 - Work with Councils to assure the Ozanam Orientation for all members.
 - Provide training for Council Ozanam Orientation Leaders.
 - Offer on-going formation in Systemic Change, Diversity/Multicultural Issues, Advocacy, Youth, Young Adults and other Formation programs.
 - Suggest Vincentian Formation resources **(See Attachment B)**
 - Conduct an annual evaluation of the Regional Formation Plan.
 - Complete report on next page and submit.



THE REGIONAL FORMATION COORDINATOR REPORT

Goal II of the Strategic Plan challenges us to:

2-1.1 Make Vincentian Spirituality as unique and compelling as our Service to those in need

Therefore:

Each year on Frederic Ozanam's birthday, April 23, the Regional Formation Coordinator will submit a report for the previous fiscal year (October-September) to the National Vice President of the Region, the National Formation Chairperson and the National Formation Director giving:

1. The list of the members of the Regional Formation Committee
2. A copy of the Regional Formation Plan

<p style="text-align: center;">THE (ARCH)DIOCESAN AND DISTRICT COUNCIL FORMATION COORDINATOR</p>

A. Selection:

- Appointed by the Council President
- Must be an Ozanam Orientation Formator
- Will have a minimum of three years as an active member and a willingness to grow in an understanding of the:
 - Charism of the Society and Vincentian spirituality.
 - History, life and spirit of the Founders.
 - Programs of Vincentian Formation in the Vincentian Pathway **(Attachment A)**.
 - Process of adult formation and the experience of working in groups.
 - Importance of communication and presentation skills.
 - Use of computers and other technology.
- Willing to attend the Invitation to Renewal, when possible.

B. Responsibilities:

- **Create a Council Vincentian Formation Committee:**

The purpose of the Vincentian Formation Committee is to create and implement a Council Formation Plan to promote the growth and development of the tradition, charism and spirituality of the Society of St. Vincent de Paul in the Council, Conferences and Special Works.

The Committee consists of the Council President, Council Formation Coordinator, Council Spiritual Advisor, a Conference Spiritual Advisor, and the Council Ozanam Orientation Leader. In addition to these members, other people with additional skill sets may become a part of the Committee.

- **Create a Council Vincentian Formation Plan:**

- Willing and able to travel to present the Ozanam Orientation.
- Assure the recruitment and training of Ozanam Orientation Formators and Presenters
- Assist in the organization of teams for Council Ozanam Orientations.
- Provide formation and training of Conference Spiritual Advisors in collaboration with Council Spiritual Advisor
- Offer on-going formation in Systemic Change, Diversity/Multicultural Issues, Advocacy, Youth, Young Adults and other Formation programs.
- Assure an active, trained Spiritual Advisor for every Conference
- Assure the Ozanam Orientation for all members.
- Guide and teach the Vincentian Pathway. **(Attachment A)**
- Suggest Vincentian Spirituality and Formation resources. **(Attachment B)**
- Conduct a yearly evaluation of the Council Formation Plan.
- Complete report on next page and submit.



<p style="text-align: center;">THE (ARCH)DIOCESAN COUNCIL FORMATION COORDINATOR REPORT</p>

Goal II of the Strategic Plan challenges us to:

**2-1.1 Make Vincentian Spirituality as unique and compelling as
our Service to those in need**

Therefore:

Each year on the Feast day of Bl. Rosalie Rendu, February 7, the (Arch)Diocesan Council Formation Coordinator will combine the data from the Council and the District Councils and submit a report for the previous fiscal year (October-September) to the Regional Formation Coordinator giving:

1. The list of the members of the Council Formation Committee

2. A copy of the Council Formation Plan

II

SPIRITUAL ADVISOR GUIDELINES



ROLES AND RESPONSIBILITIES

REGION COUNCIL CONFERENCE

The Rule 3.13 states:

“Members of the Society are united in the same spirit of poverty and sharing. They encourage one another to live a profound spiritual life and spirit of prayer. For this purpose, the role of SPIRITUAL ADVISOR IS VERY IMPORTANT.”

INTRODUCTION

The Journey Together Towards Holiness

“Vincentians are called to journey together towards holiness, because true holiness is perfect union with Christ and the perfection of love, which is central to their vocation and the source of its fruitfulness. They aspire to burn with the love of God as revealed by Christ and to deepen their own faith and fidelity. (Rule 2.2)

To grow in holiness:

The purpose of the Society of St. Vincent de Paul is to increase the holiness of its members, and so from its foundation the Society has affirmed the importance of the role of Spiritual Advisor as being essential to its life and mission. The Spiritual Advisor is responsible for the spiritual development of either a Region, Council or a Conference. This requires a solid knowledge of the Catholic faith and a full knowledge of and dedication to the mission and ministry of the Society, which is inclusive of evangelizing the poor and being evangelized by the poor.

Goal II of the Strategic Plan of the Council of the United States is dedicated to “Encourage and support Vincentians on their spiritual journey” with the objective to “Enhance the formation, and grow the number, of spiritual advisors at all levels in the Society.” The Region, Council or Conference leadership, therefore, has the obligation to cultivate an active and formed lay, ordained and/or religious for every Council, Conference and Special Work by selecting a Catholic person who is both willing and able to devote the necessary time and energy to the role of Spiritual Advisor. It is imperative that Spiritual Advisors be rooted in Vincentian Spirituality and so it is essential that they attend and participate in meetings. At the present time in the Church, the demands of the parish on the priest prevent most pastors from fulfilling the role of Spiritual Advisor for the Society. Often the best person is a devoted Vincentian who is steeped in Vincentian spirituality.

Vocation of the Laity:

Today, we stand in the grace of Vatican II which called forth the vocation of the laity. This is also rooted in the spirit of the Society of St. Vincent de Paul, where the Catholic layman Emmanuel Bailly assumed the role of Spiritual Advisor for the founding members of the Confraternity of Charity. Therefore, in this grace and heritage, we will find that in our Region, Council and Conferences often there is a member, rooted in Vincentian spirituality or someone who has the willingness to be formed, who is waiting for the invitation to be called forth to serve in the role of Spiritual Advisor. In some places an ordained deacon or a vowed religious may be available to serve as a Spiritual Advisor if they have been or are willing to be formed in the Vincentian charism. The Spiritual Advisor’s task is that of spiritual animator/facilitator. Spiritual Advisors play an important role in promoting the mission of the Society and in developing a sense of friendship among the members. In keeping with changing times and needs, they provide inspiration and challenge for the adoption of new works. Spiritual Advisors are full members but if ordained they do not vote.

THE REGIONAL SPIRITUAL ADVISOR

A. Selection:

- Selected by the National Vice President for the Region according to Rule III, Statute 15.
- The Regional Spiritual Advisor must have a willingness to grow in the understanding of the:
 - Commitment to the call and pursuit of Vincentian holiness.
 - Value of lay ministry in the fulfillment of the mission of the Church.
 - Importance of personal witness to living a spiritual life.
 - Charism, spirituality, mission and ministry of the Society.
 - Teachings of the Catholic Church including its Social Teachings.
 - History of the Society and the lives of the Founders.
 - Importance of direct service to the needy and being a member of a Conference.
- Will attend the Invitation for Renewal.

B. Responsibilities:

- **Assist the National Vice President for the Region to:**
 - Assure that Vincentian spirituality and mission is included in the Regional meetings and events.
 - Participate in the Regional Formation Committee
 - Provide consultation, advice and assistance in situations where the mission, spirituality and/or Rule of the Society is being violated.
 - Be available on request to give Vincentian talks, retreats, etc. for Councils and isolated Conferences.
 - Be willing to attend and participate in Regional Meetings.
 - Maintain a list of the Council Spiritual Advisor's information and ensure entry into the database.
 - Submit the Regional Spiritual Advisor Report to the National Vice President for the Region and the National Formation Chairperson.



THE REGIONAL SPIRITUAL ADVISOR REPORT

Goal II of the Strategic Plan challenges us to:

2-2.1 Have a trained Spiritual Advisor active in 85% of Conferences and Councils by 2020.

Action A: Create an accurate list of Council Spiritual Advisors and enter into the national data base.

Action B: Create an accurate list of Conference Spiritual Advisors and enter into the national data base.

2-2.2 Develop and promote resources for Councils on-going training of Spiritual Advisors

Action B: Conduct the updated formation session for Spiritual Advisors to ensure their appropriate training

Therefore:

Each year on Frederic Ozanam's birthday, April 23, the Regional Spiritual Advisor will submit a report for the previous fiscal year (October-September) from the Annual Report data, to the National Vice President of the Region, the National Formation Chairperson and the National Formation Director giving:

1. The name and contact information for all Council Spiritual Advisors are listed on the database: ___Yes ___No
2. The total number of Council Spiritual Advisors: _____(_____%)
3. The total number of Conference Spiritual Advisors: _____(_____%)
4. The total number of Spiritual Advisor Training workshops (English) in the Region _____ and number of participants _____
5. The total number of Spiritual Advisor Training workshops (Spanish) in the Region _____ and number of participants _____

THE (ARCH)DIOCESAN AND DISTRICT COUNCIL SPIRITUAL ADVISOR
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A. Selection:

- Selected by the Council President according to Rule III, Statute 15
- The (Arch) Diocesan/District Spiritual Advisor, priest, deacon or lay, must have a willingness to grow in the understanding of the:
 - Commitment to the call and pursuit of Vincentian holiness.
 - Value of lay ministry in the fulfillment of the mission of the Catholic Church.
 - Importance of personal witness to the growth of his/her own spiritual life.
 - Charism, spirituality, mission and ministry of the Society.
 - Teachings of the Catholic Church including its Social Teachings.
 - History of the Society and the lives of the Founders.
 - Importance of direct service to the needy and being an active member of a Conference.
- Willing to attend the Invitation for Renewal, when possible.

B. Responsibilities

- **Assist the Council President to:**
 - Communicate the value, works and needs of the Society to the local Diocesan administration and parish communities.
 - Attend Regional and National meetings as often as possible.
 - Assure that there are Vincentian spiritual formation components in Council events.
 - Arrange Vincentian spirituality and formation retreats, days of recollection and celebrations for the feasts of our Founding Saints and Blesseds.
 - Assure that the Vincentian Annual Commitment ceremony is conducted on Ozanam Sunday or at a liturgy annually.
 - Mentor the use of Commissioning ceremonies and other Rituals.
- **Provide for the formation of Conference Spiritual Advisors:**
 - Maintain a list of the Conference Spiritual Advisor's information and ensure entry into the database.
 - Train Conference Spiritual Advisors in:
 - Vincentian spirituality,
 - The use of Vincentian materials provided by the National Office,
 - How to facilitate faith sharing at conference meetings and conduct prayer services.
 - Meet twice a year, in person or conference call, with District Spiritual Advisors.
 - Suggest resource material for the membership to assist in their Vincentian spiritual development and servant leadership capacities. **(Attachment B)**
 - Mentor Conference Spiritual Advisors in the use of the Vincentian Pathway. **(Attachment A)**
 - Complete the Annual Council Spiritual Advisor Report (on the next page) and submit it to the Regional Spiritual Advisor.



**THE (ARCH)DIOCESAN AND DISTRICT COUNCIL
SPIRITUAL ADVISOR REPORT**

Goal II of the Strategic Plan challenges us to:

2-2.1 Have a trained Spiritual Advisor active in 85% of Conferences and Councils by 2020 and enter into the national data base.

Action B: Create an accurate list of Council and Conference Spiritual Advisors

2-2.2 Develop and promote resources for Councils on-going training of Spiritual Advisors

Action B: Conduct the updated formation session for Spiritual to ensure their appropriate training

Therefore:

Each year on the feast of Bl. Rosalie Rendu, February 7, the Council Spiritual Advisor will submit a report for the previous fiscal year (October-September) from the Annual Report data, to the Regional Spiritual Advisor giving:

1. The name and contact information for the Council Spiritual Advisor
2. The total number of Conference Spiritual Advisors: _____(_____%)
3. The total number of Spiritual Advisor Training workshops (English) in the Council _____ and number of participants _____
4. The total number of Spiritual Advisor Training workshops (Spanish) in the Council _____ and number of participants _____

THE CONFERENCE SPIRITUAL ADVISOR

A. Selection:

- The Conference Spiritual Advisor, priest, deacon or lay, is determined in prayerful deliberation by the Conference members and is appointed by the Conference President.
- The Conference Spiritual Advisor attends Council formation events and has a willingness to grow in the understanding of the:
 - Commitment to the call and pursuit of Vincentian holiness.
 - Value of lay ministry in the fulfillment of the mission of the Church.
 - Importance of personal witness to the growth and deepening of his/her own spiritual life.
 - Charism, spirituality, mission and ministry of the Society.
 - Teachings of the Catholic Church including its Social Teachings.
 - History of the Society and the lives of the Founders.
 - Regular attendance at Conference meetings.
 - Personally participating in home visits and giving direct service to the poor.
- If the Pastor wishes to be the Spiritual Advisor but is not able to fulfill the responsibilities of the role, the Conference President will appoint an appropriate Vincentian as the Associate Spiritual Advisor.

B. Responsibilities of a Conference Spiritual Advisor

- **Attend Conference meetings regularly and remain for the entire time**
 - Follow the Spiritual Advisor Handbook
 - Assist members to reach a deeper faith awareness of their:
 - Vincentian vocation and their call to holiness.
 - understanding of the charism and spirituality of the Society.
 - mission to serve those who are in need by person-to-person care.
 - comprehension of the Essential Elements of the Society—Spirituality, Friendship, Service.
 - Suggest resource material for the membership to assist in their Vincentian spiritual development and servant leadership capacities. (**Attachment B**)
- **Collaborate with the Conference President to:**
 - Offer programs for the spiritual development of the members.
 - Discern the readiness for active (full) membership of new members.
 - Ensure that all meetings are conducted in a spirit of Vincentian Friendship.
 - Maintaining a balance between Vincentian formation and prayer with the discernment on needs of the poor.
- **Mentor all Vincentians through the use of the Vincentian Pathway. (Attachment A)**

III

OZANAM ORIENTATION GUIDELINES



ROLES AND RESPONSIBILITIES

REGION COUNCIL

The National Ozanam Orientation Program, the basic formation program for all Vincentians is offered to every active, associate and new member of the Society. The Regional and Council Ozanam Orientation Leader trains and approves Formators and Presenters to conduct the Ozanam Orientation.

INTRODUCTION

Making the Ozanam Orientation available to all Vincentians

The Ozanam Orientation program is organized by Regional and Council Ozanam Orientation Leaders who are responsible for preserving the authentic content and presentation of the Ozanam Orientation. Responsibilities for each role are described in the following guidelines.

The Ozanam Orientation is taught by Formators and Presenters, who have overlapping but distinct roles. To ensure an effective overall Orientation, at least one organizer must have significant understanding of all its content. This is the role of the Formator, who oversees the entire program and may also present one or multiple sections. The Formator is supported by Presenters, who have been trained to deliver one or more (but not all) sections of the orientation. In short:

A **Formator** is responsible for the complete oversight of the Ozanam Orientation, is able to present all sections and has a willingness to pursue on-going knowledge of Vincentian spirituality and formation.

A **Presenter** is a person who is able to present a section or several sections of the Ozanam Orientation.

The vision of the National Ozanam Orientation is captured in the Resolution approved in 2010, which states that “It is critically important that a consistent message be presented by Councils throughout the United States...” Therefore, Formators are not free to make significant changes to the Ozanam Orientation slides. A consistent nation-wide set of slides makes it possible for Formators from different Councils to jointly present Orientations in under-served areas. This will radically improve the availability of the Orientation. Consistency also makes it much easier to provide training for Formators and presenters.

Consistency also benefits Conference members. They can attend the nearest Orientation, whether or not it’s in their own home Council or Diocese. Using the approved Ozanam Orientation program means that the Participant’s Guide and other materials can be provided in both English and Spanish. Best practice indicates that the Ozanam Orientation should always be presented either in a day long time frame or in two half days. This is to insure the integrity of the Vincentian formation process. Under no circumstance should the time be condensed or reduced to less than the equivalent of a full-day session.

THE REGIONAL OZANAM ORIENTATION LEADER

A. Selection and Qualifications:

- Selected by the National Vice President for the Region, after consultation with the National Formation Chairperson.
- Must be an Ozanam Orientation Formator
- Will have a minimum of three years as an active member and a willingness to grow in an understanding of the:
 - Charism of the Society and Vincentian spirituality.
 - History, life and spirit of the Founders.
 - Vincentian Formation programs in the Vincentian Pathway.
(Attachment A)
 - Process of adult formation and experience in working with groups.
 - Experience in communication and presentation skills.
 - Ability to work with technology
 - Ability to identify and develop candidates for Presenters and Formators
- Willing to attend the Invitation for Renewal, when possible.

B. Responsibilities

Serve as a member of the Regional Formation Committee, ensuring compliance with the National OO resolutions **(Attachment C)**

- Assist Councils and Isolated Conferences to develop and implement their own plan for the Ozanam Orientation.
- Assist in finding Council OO Leaders
- Facilitate partnering across neighboring Councils
- Ensure an accurate list of Council OO Leaders
- Train, mentor and commission OO Leaders in their Region
- Be willing and able to travel to teach OO Leaders
- Ensure that Commissioning of the Council OO Leaders, Formators and Presenters takes place at an appropriate time.
- Suggest Vincentian Spirituality and Formation resources **(Attachment B)**
- Submit the annual Regional Ozanam Orientation Report to the National Vice President for the Region, the National Formation Director and the National Formation Chairperson.



THE REGIONAL OZANAM ORIENTATION LEADER REPORT

Goal II of the Strategic Plan challenges us to:

- **Strive for a 10% increase of Ozanam Orientations offered, including in Spanish, with trained formators by Councils by May 2020.**
- **Strive for a 20% increase of members attending the Ozanam Orientation by May 2020.**

Therefore:

A. Each year on Frederic Ozanam's birthday, April 23, the Ozanam Orientation Regional Leader will submit a report for the previous fiscal year (October-September) from the Annual Report data, to the National Vice President of the Region, the National Formation Chairperson and the National Formation Director giving:

1. The total number of Ozanam Orientations in English conducted in the Region: _____ and the total number of participants: _____
2. The total number of Ozanam Orientations in Spanish conducted in the Region: _____ and the total number of participants: _____
3. The total number of trained OO Formators (English) in the Region _____
The total number of trained OO Formators (Spanish) in the Region _____
4. The total number of trained OO Presenters (English) in the Region _____
The total number of trained OO Presenters (Spanish) in the Region _____
5. The total number of OO Formator Training workshops (English) in the Region _____
The total number of OO Formator Training workshops (Spanish) in the Region _____

B. With the Report to the National Vice President of the Region, the Regional Ozanam Orientation Leader will include:

1. The Regional Ozanam Orientation Plan
2. The list of the Trained Formators and Presenters of each Council

THE (ARCH)DIOCESAN AND DISTRICT COUNCIL OZANAM ORIENTATION LEADER

A. Selection and Qualifications:

- Selected by the Regional OO Leader, after consultation with the Council President.
- Must be an Ozanam Orientation Formator
- Will have a minimum of three years as an active member and a willingness to grow in an understanding of the:
 - Charism of the Society and Vincentian spirituality.
 - History, life and spirit of the Founders.
 - Vincentian Formation programs in the Vincentian Pathway.
(Attachment A)
 - Process of adult formation and experience in working with groups.
 - Experience in communication and presentation skills.
 - Ability to work with technology
 - Ability to identify and develop candidates for Presenters/Formators
- Willing to attend the Invitation for Renewal, when possible.

b. Responsibilities:

- Train and approve OO Formators for the Council
- Schedule, oversee and/or conduct Ozanam Orientations
- Responsible for the oversight of ordering and distribution of OO Formation materials
- Create an accurate list of Council Formators and Presenters and ensure entry into the National database
- Ensure that Vincentians who have attended the OO are entered into the National database
- Submit an annual report to the Regional OO leader with the number of OO's in English and Spanish and the number of Vincentians completing the OO



THE (ARCH)DIOCESAN COUNCIL OZANAM ORIENTATION LEADER REPORT
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Goal II of the Strategic Plan challenges us to:

- **Strive for a 10% increase of Ozanam Orientations offered, including in Spanish, with trained formators by Councils by May 2020.**
- **Strive for a 20% increase of members attending the Ozanam Orientation by May 2020.**

Therefore:

A. Each year on the feast of Bl. Rosalie Rendu, February 7, the Council Ozanam Orientation Leader will submit a report for the previous fiscal year (October-September) from the Annual Report data, (Annual Report data) to the Regional Ozanam Orientation Leader, giving:

1. The total number of Ozanam Orientations in English conducted in the Council: _____ and the total number of participants: _____
2. The total number of Ozanam Orientations in Spanish conducted in the Council: _____ and the total number of participants: _____
3. The total number of trained OO Formators (English) in the Council: _____ and Formators (Spanish) in the Council: _____
4. The total number of trained OO Presenters (English) in the Council _____ and OO Presenters (Spanish) in the Council _____
5. The total number of OO Formator Training workshops (English) offered in the Council _____ and workshops (Spanish) _____

B. With the Report to the Regional Ozanam Orientation Leader, the Council Ozanam Orientation Leader will include:

1. The Council Ozanam Orientation Plan
2. The list of the Trained Formators and Presenters of each Council

(ARCH)DIOCESAN AND DISTRICT COUNCIL OZANAM ORIENTATION FORMATORS AND PRESENTERS

Selection and Approval:

- Formators are approved by the Council OO Leader.
- Presenters are trained by their Council Formators
- **Formators** should have the:
 - Capability to organize, schedule, and set up an Ozanam Orientation.
 - Ability to present all sections of the Ozanam Orientation.
 - An in-depth knowledge of the Society at the local, regional and national levels so that when a question is presented, they can answer the question accurately.
 - must have a willingness to pursue on-going knowledge of Vincentian spirituality and formation
 - Ability to develop skills of presenters and guide presenters to a better capacity for presentations if they need guidance.
- **Presenters** should have
 - The capability to present one or more sections of the Ozanam Orientation.
- **Formators and Presenters** must have a willingness to grow in an understanding of the:
 - Charism of the Society and Vincentian spirituality.
 - History, life and spirit of the Founders.
 - Program of Vincentian Formation.
 - Use of computers and other technology.

Responsibilities of a FORMATOR:

- Schedule and conduct Ozanam Orientation in conjunction or in collaboration with the Council OO Leader
- Responsible for ordering and distribution of OO Formation materials
- Ensure that Vincentians who have attended the OO are entered into the database
- Some Formators have accepted responsibility for presenting other formation materials in addition to the Ozanam Orientation, such as training Spiritual Advisors, presenting Invitation to Serve, or conducting workshops on mentoring and the Home Visit, to name just a few.

Responsibilities of a PRESENTER:

- **Prepare and Present one or more sections of the OO**

OZANAM ORIENTATION FORMATOR TRAINING PROCEDURES

Candidate Requirements:

- A Vincentian with normally 3 years of experience and approval of Council/Region
- Attended an Ozanam Orientation (OO)
- Effective presentation skills
- Willingness to grow in knowledge and spirituality of the Society
- Experience in home visitation
- Proficient with computers and technology

Goal:

- To prepare Ozanam Orientation Formators to competently present all sections of the Ozanam Orientation

Objectives: Upon completing the training, the participant will have:

- An understanding of the distinction between formation and training, and how that applies to the Ozanam Orientation.
- Basic knowledge of and commitment to Vincentian spirituality
- Knowledge of the resources needed to present all sections of the Ozanam Orientation
- A commitment to present the Ozanam Orientation authentically, according to the National Resolution (**Attachment C**)

Materials Provided on Flash Drive:

- Ozanam Orientation slides and videos
- Participant's Guide in PDF form
- Optional handouts for participants
- Ozanam Orientation Formator's Guide.
- Formator tools and documents: a collection of useful tools for formators. Includes optional exercises and videos.

Procedures for Training:

- The Regional Ozanam Orientation Leader and/or Assistant Leader will present the Formator Training. (this can be done in person or via the web)
- Formator training must include substantial practice on the part of the participants, who will give sections of the Ozanam Orientation for each other.
- The Ozanam Orientation Leader may design the training to meet the situation and the needs of the participant.

Evaluation:

- The trainer, or Ozanam Orientation Leader specifically designated by the trainer, must observe the new Ozanam Orientation Formator who is being trained presenting multiple sections in order to assess if the Objectives have been met. A live Ozanam Orientation program is preferred but not required.
 - The person in training is not considered to be a Formator until he/she has met the Objectives as assessed by the OO Leader.
 - A Commissioning ceremony and pin is highly recommended for both Formators and Presenters.

Developing an Ozanam Orientation Team:

- The Ozanam Orientation Formator may train OO Presenters for selected sections of the Ozanam Orientation. Presenters can give sections as a member of a team under the supervision of a trained Ozanam Orientation Formator.

IV

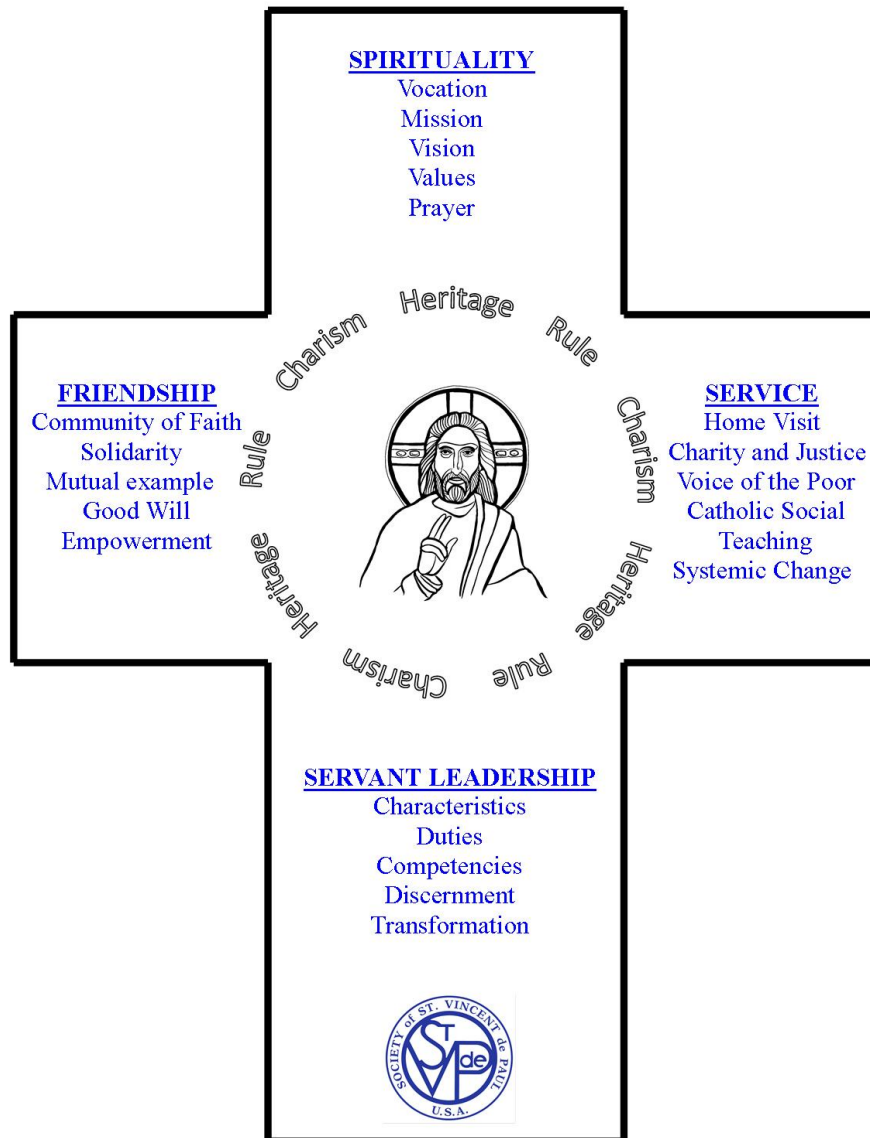
ATTACHMENTS



Attachment A

THE VINCENTIAN PATHWAY

A Process for Ongoing Formation as a Vincentian...



...Growing in Vincentian Leadership

The Vincentian Pathway

Our Rule: Part 1, 3.12 states:

“It is essential that the Society continually promote the formation and training of its members and Officers, in order to deepen their knowledge of the Society and their spirituality, and to improve the sensitivity, quality and efficiency of their service to the poor...”

Therefore, the **Vincentian Pathway** is being offered as an opportunity for every Vincentian to engage in an on-going process of formation. This formation process is based on the Essential Elements of the Society (Spirituality-Friendship-Service) and Servant Leadership. As you walk your journey as a Vincentian you will encounter many delights and many challenges. Along the way you will grow and change. The **Vincentian Pathway** will help you to discover, develop, deepen and discern your Vincentian heart by forming your mind and attitude into a Vincentian way of serving.

To assist you in this formation process the four components of the **Vincentian Pathway** are inter-related and as you are challenged and grow through one component you will find challenge and growth through the others. This process will develop your Vincentian vocation and prepare you for the many and different Leadership Roles that God may call you to assume throughout your Vincentian life. The four components are:

- **Spirituality:** will root you in a clear understanding of the Vincentian Spirituality which underlies your Vincentian vocation: mission, vision, values and prayer.
- **Friendship:** will provide you with the ways to gather the support, advice and encouragement you need for your Vincentian journey: community of faith, solidarity, mutual example, good will and empowerment.
- **Service:** will guide you to see exciting new ways to serve with a Vincentian heart, so that you will be able to strengthen your current service: home visits, charity and justice, voice of the poor, catholic social teachings, systemic change.
- **Servant Leadership:** will lead you to become a true Vincentian Servant Leader in the spirit of Jesus and our Founders: characteristics, duties, competencies, discernment, transformation.

Since 2000, through the Strategic Plan—Goal 1, Vincentian Spiritual Formation materials and programs have been developed and the **Vincentian Pathway** began transforming volunteers into Vincentians. On the Pathway, the Holy Spirit leads your Vincentian heart in the twist and turns of **Discovering, Developing, Deepening** and **Discerning** in your Vincentian vocation.

Attachment B

VINCENTIAN SPIRITUALITY RESOURCES

For Spiritual Advisors and Formators

I. SVdP NATIONAL COUNCIL RESOURCES

The order form and catalog for the following resources are found on www.svdpusa.org

Serving in Hope:

- Module I: Our Vincentian Vocation
- Module II: Our Vincentian Spirituality
- Module III: Our Vincentian Heritage
- Module IV: Our Vincentian Mission
- Module V: Our Vincentian Rule
- Module VI: Our Vincentian Conference
- Module VII: Our Vincentian Home Visit

Apostle in a Top Hat, by *James Patrick Derum*

Turn Everything to Love by *Robert P. Maloney, CM*

Faces of Holiness by *Robert P. Maloney, CM*

Vincentian Meditations, by *Thomas McKenna, CM.*

Apostolic Reflection with Rosalie Rendu, by *Joan Gibson, DC and Kieran Kneaves, DC*

Spirituality of the Home Visit

T's a Gift, by *Robert P. Maloney, CM*

A New Century Dawns, by *Robert P. Maloney, CM*

Mystic of Charity, by *Robert P. Maloney, CM*

The Frederic Ozanam Story

Seeds of Hope: Stories of Systemic Change

II. SOCIAL JUSTICE TEACHINGS OF THE CHURCH RESOURCES

Compendium of the Social Doctrine of the Church; by the *Pontifical Council of the Social Doctrine of the Church* Order on Amazon.com

The website for the United States Conference of Catholic Bishops: www.USCCB.com

Busy Christian's Guide to Catholic Social Teaching: www.uscatholic.org

III. AMAZON: The following can be ordered on www.amazon.com :

St. Vincent de Paul:

Vincent de Paul, The Trailblazer, by *Bernard Pujo*

Praying with Vincent de Paul, by *Tom McKenna, CM*

The Way of Vincent de Paul: A Contemporary Spirituality in the Service of the Poor,
by *Robert P. Maloney, CM*.

Go! On the Missionary Spirituality of St. Vincent de Paul, by *Robert P. Maloney, CM*.

Vincent de Paul and Charity, by *Andre Dodin, CM*.

St. Louise de Marillac:

Praying with Louise de Marillac, by *Audrey Gibson, DC and Kieran Kneaves, DC*.

Louise de Marillac: Social Aspect of Her Work, by *Margaret Flinton, DC*.

Louise de Marillac: A Light in Darkness, by *Kathryn LaFleur, SP*.

Blessed Rosalie Rendu:

Sr. Rosalie Rendu: A Daughter of Charity on Fire with the Love of the Poor by
Louise Sullivan, DC

Blessed Frederic Ozanam:

Antoine Frederic Ozanam by *Raymond Sickinger*

Ozanam, by *Madeline des Rivières*

Frederic Ozanam, by *Mary Ann Garvey Hess*

Praying with Frederic Ozanam by *Ronald Ramson, CM*

Vincentian Spirituality:

Classics of Western Spirituality Series: Vincent de Paul and Louise de Marillac

Deep Down Things, by *Richard McCullen, CM*.

He Hears the Cry of the Poor: On the Spirituality of Vincent de Paul, by *Robert Maloney, CM*.

Attachment C

NATIONAL OZANAM ORIENTATION RESOLUTION-2010

Whereas, membership in the Society of St. Vincent de Paul is both a **vocation and a ministry** to those in need, with our primary goal being growth in holiness, consequently we should be striving constantly to help each other and encourage each other in that growth. And,

Whereas, in order to help all Vincentians to understand and live the mission and spirituality of the Society, the National Council accepted the **National Ozanam Orientation Program** in 2006. And, since the purpose of the Ozanam Orientation Program is twofold:

1. To introduce new members to “who we are and what we are all about.”
2. To reacquaint existing members with our “spirituality and heritage.”

The target audience for the Ozanam Orientation Program includes existing members, new members, prospective members and interested parties. And,

Whereas, it is **critically important that a consistent message be presented by Councils throughout the United States** while allowing for flexibility of presentation styles, therefore be it **Resolved that: All elements of the National Ozanam Orientation Program be presented.**

- The Orientation be led by **trained Formators.**
- The Rule, Manual and Ozanam Orientation Participant’s Guide be provided for each member attending.
- **All information contained in the slide presentations provided by National must be conveyed during the Ozanam Orientation.** An individual Council may be creative in how they accomplish this provided they are in accordance with other parts of this resolution.
- Vincentians grow in holiness together, and in the spirit of friendship of our Founders, the Ozanam Orientation must always be presented to a community of members by a trained Formator(s), **not as an isolated event using AV or Internet alone.**

In order to insure the consistency of content, the National Formation Chair, National Formation Director and the Regional Formation Coordinator in consultation with the Regional Vice President, must be consulted for **authorization and certification of any changes to the content of the National Ozanam Orientation program. (Approved: April 23, 2010)**

Therefore, an Ozanam Orientation Formator must:

- **study, prepare and organize their presentation.**
- **fulfill the regulations of the Ozanam Orientation Resolution.**
- **possess good communication and presentation skills**
- **be willing to work with a team.**
- **be open to evaluation.**

Resolution-2011

Society St. Vincent de Paul, Inc.

Board of Directors Meeting

June 16, 2011

A Resolution to establish the Ozanam Orientation as required for new active members, all Officers, Spiritual Advisors in the Society.

Whereas the Ozanam Orientation has been approved by the National Council as the program through which members are introduced to the Society, and

Whereas experience has proven the value of the Ozanam Orientation in preparing new and existing members of the Society to better understand the mission, spirituality, organization, history, Rule, accountability, strategic plan and home visitation aspects of the Society, and

Whereas the Society has now developed the capacity to present the Ozanam Orientation in all Regions and through the Regions to Councils and Isolated Conferences;

Therefore be it Resolved that the National Board of Directors recommends that the National Council require that:

- All new active members must attend Ozanam Orientation within one year.
- All existing members of the Society should be required by their Councils to attend an Ozanam Orientation in order to reacquaint themselves with the “spirituality and heritage” of the Society and prepare themselves to enter the “Vincentian Pathway” process .
- The Ozanam Orientation should be taken before taking office, for all Council and Conference officers and Spiritual Advisors, but must be taken within one year after taking office. All Executive Directors are required to take the Ozanam Orientation within one year of being hired.
- The effective date for this resolution is January 1, 2012.

The category of this Resolution is **Formation and Training**

Resolution number: **6/16/2010-11 93**

Board of Directors Approved June 17, 2011

National Council Approved September 2, 2011