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FRANCISCAN MINISTRIES GUIDANCE ON REAL ESTATE TRANSACTIONS

It is the intent that the entire process is collaborative. This guidance document is designed to answer the question: What are the general characteristics the Trustee (Franciscan Ministries) looks for when approving a real estate transaction? It will also outline some process considerations. This includes, but is not limited to, purchases, sales, donations, lease signing and/or lease extensions.

While the decision to engage in any real estate transaction is the sole authority of the Trustee and does not require the approval of the local ministry board, as a matter of practice, the Trustee typically seeks counsel from the board on real estate matters before making the final decision.

A Collaborative Process

The decision of entering a real estate transaction can be one of the most significant purchases a ministry can make. It can have long lasting ramifications on the site and while it may greatly support short term needs, it can impede the ability to support the long-term goals of the ministry. The process, as described in the bylaws, is for the Trustee (FM) to approve all transactions. To do this, the Trustee generally relies on a recommendation from the board. Though the Trustee relies heavily on the board recommendation, it is the Trustee's responsibility to make an independent assessment of the transaction before approving it.

The most successful process is one where Boards and Trustee are aligned on the requirements and characteristics needed for the transaction from the start and that at least one Trustee participates in the process. This collaboration will significantly increase the likelihood of Trustee approval and the satisfaction of all parties that we have made the right decision supporting the strategic mission of the ministry.

Process Considerations

1. Make clear how the proposal aligns with the ministry's strategy and long term goals
2. We encourage you to do an analysis of the utilization of your current property to assess if there are other options
3. Proposal should include feedback/recommendations by professionals such as realtors, legal, environmental, etc.
4. If the project is dependent on city approval or zoning, the Trustee recommends engaging the city before a proposal is submitted to the Trustee to ensure there are no restrictions.
5. Including a risk assessment of the project is encouraged.



6. Board/Trustee Collaboration: The trustee recommends that an FM board member be on the committee exploring real estate transactions.
7. Boards will be notified of the Trustee decision

The request should also address what are the long term needs of the site and/or ministry. Some examples of questions that the proposal should address are as follows:

1. Are the new services you are looking to offer that the existing site cannot support?
2. Are we optimizing the space we currently have?
3. Have we engaged with a broker and/or landlord?
4. Have we completed an assessment of the area to evaluate all options?
5. Do we know what obligations we would be assuming with the targeted property?
6. Have we engaged with the city on specific zoning requirements?
7. Do you have the means to support the cost of the property?

Key Considerations of the Trustee when making a decision on real estate transactions:

1. Does proposal align with ministry strategy and province goals?
2. Has a case been made that this transaction is beneficial and the best option available?
3. Are the risks and opportunities clearly understood?
4. Is the proposal based on the analysis and recommendations of professionals?
5. How will the project be funded?
6. What contracts are involved and have they been reviewed by an attorney? Are the terms reasonable?
7. What liability will be assumed by the ministry?

It is important to reinforce that this should be a collaborative process, and asking for help early in the process is encouraged.

A separate document is also available for recommendations and best practices on how to approach a lease/purchase property. This document is available through the Franciscan Ministries office upon request.



FRANCISCAN MINISTRIES GUIDANCE ON FINANCIAL BUDGET PROCESS

This guidance document is designed to answer the question: What are the general characteristics the Trustees look for when approving the financial budget? It will also outline some process considerations.

A Collaborative Process

A financial budget is critical to both the short and long term viability of the success of a ministry in that it can help align strategic programs to that of financial targets, as well as help support justifications for additional funding of new programs. Although the budget must be aligned and approved by the local leadership team, ensuring support of the trustees is crucial.

Process Considerations

Two months prior to the start of the fiscal year, it is time to review operating budgets for the following year, as well as discuss cash flow and your strategic plans. It is recommended that the following be provided prior to the review with FM:

1. The same information prepared for your board/leadership team that represents the income, expenses, and cash flow projections.
2. A summary (one to two-page) narrative that lays out commentary for performance against last year's objectives and financial budget, any updates to mission and strategic objectives. The narrative should also include a recommendation from the members to the Trustees regarding approval, and a summary of the solidarity calculation (as outlined in the solidarity guidance document).
3. Self-assessment financial guide (green, blue, yellow, red). A sample is on the next page.

Key Considerations of the Trustee when deliberating on budget approval:

1. Does the budget align with the ministry's strategy and goals?
2. Have the programs been funded for success?
3. Are the financial risks and opportunities clearly understood and in balance?
4. Is the budget realistic?
5. Does the leadership team support the budget?
6. The budget should reflect a sustainable business whereby the net operating profit is positive. If there are extraordinary circumstances for the budgeted year, a longer term (3-5 year) profile should also be included in the budget package outlining a sustainable business plan.



Once the budget has been reviewed by the Trustee, feedback will be provided as to next steps, either follow up questions, or approval. It is recommended that the questions be addressed within 10 days of receiving them so that the budget is approved on day 1 of the new fiscal year.

Appendix A

**Financial Assessment Discussion Guide
Institutions and Province Self Assessment**

Location	Overall Score ¹	Categories			Overall Trend ⁵	Overall Trend Comments
		Financial Control ²	Financial Strength ³	Sustainability ⁴		
San Diego Retreat Center					↑	Overall retreat volumes are starting to increase, and we are not seeing cancellations. Ladato Si improvements are in place, and we are seeing some long term benefits in the way our employees are working together to improve

Assessment

-  Strong position
-  Opportunity for improvement
-  Needs attention
-  Areas of concern

¹Overall Score

²Financial Control

³Financial Strength

⁴Sustainability

⁵Overall Trend

Trend versus LY

Overall evaluation considering Control, Strength and Sustainability results
 Considers quality of financial information, financial skills and oversight relationships
 Financial performance relative to break even and balance sheet resiliency
 Financial trends (net surplus/deficit/flat), development performance trend, general succession planning for key roles
 Future trend considering history and new strategies

↑ Strengthening

→ About the same

↓ Weakening



FRANCISCAN MINISTRIES GUIDANCE ON SOLIDARITY CONTRIBUTION

Rooted in our Franciscan tradition and charism, our philosophy of solidarity contributions is developed to support a practical expression of care for the ministry of the province enlivened at individual ministries. “It grows increasingly true that the obligations of justice and love are fulfilled only if each person contributing to the common good, according to his own abilities and the needs of others, also promotes and assists the public and private institutions dedicated to the bettering of human life.” (Gaudiam et Spes, #30) We live in a reciprocal relationship of Individual and communal concerns and benefits. As we continue to develop the articulation of a shared Franciscan culture and vision, we now have the opportunity to express this through sharing our common financial and talent resources, and a solidarity contribution allows that to happen.

Solidarity contributions are very scripturally based as we hear in the story of the woman giving her last five coins to the temple (Mark 12:41-44) and Jesus saying that, “Much will be required of the person who is entrusted with much and still more will be demanded of the person entrusted with more.” (Luke 12:48) Beyond that, the solidarity contribution recognizes the interconnectedness of all the ministries in the Western US. We are all part of the Franciscan movement that has been passed down from the friars as they evangelized in the areas we serve. The target percentage for solidarity contribution is 4% of unrestricted revenue¹. If there are extraordinary circumstances whereby a lower contribution is requested, the ministry should outline the rationale as part of the budget submission. The calculation should be Included as part of the annual budget submission.

This contribution will allow FM to provide support to the ministry in areas of mission integration support, finance, operations, real estate, insurance, legal, and many other services as requested. These contributions allow FM to provide grants to ministries in need when short-term needs arise.

Process Consideration:

1. Payment should be budgeted and processed monthly by the 20th.
2. When the actual payment is processed, it should be on actual unrestricted revenue at the budgeted solidarity rate.

Note 1:

Generally Accepted Accounting Principles (GAAP) define unrestricted revenue as all funds received by a ministry that they can use at its own discretion, without donor-imposed conditions. These funds are not bound by restrictions and can be allocated to support various operating needs, including payroll, program costs, utilities, and other day-to-day costs that support the work of the ministry.



**FRANCISCAN MINISTRIES GUIDANCE
SELECTION & APPOINTMENT of an EXECUTIVE
DIRECTOR/CEO/President**

A Collaborative Process

Selecting an Executive Director/CEO/President is one of the most important decisions made by our Trustees and Boards. The process, as described in the bylaws, is for the Trustees (FM) to appoint the person. To do this, the Trustees generally rely on a recommendation from the board. Though the Trustees rely heavily on the board recommendation, it is the Trustee's responsibility to make an independent assessment of the candidate before appointing them.

The most successful process is one in which Boards and Trustees are aligned on the requirements and characteristics needed for the position from the start and that at least one Trustee participates in the Selection Committee. This collaboration will significantly increase the likelihood of Trustee approval and the satisfaction of all parties that we have found the best possible candidate.

This guidance document is designed to answer the question: What are the general characteristics the Trustees look for when appointing an Executive Director? It will also outline some process considerations.

Process Considerations

1. Succession Planning: Did/does the board have a succession plan in place? If so, is this board's recommendation aligned with the plan? If an internal candidate is being recommended, Trustees will want to know what kind of development has been done to prepare the person for the role, what gaps still exist and what the plan is to address those gaps.
2. Board/Trustee Collaboration: Trustees recommend that an FM board member be on the selection committee.
3. Candidate Acknowledgements: Before recommending a candidate to the Trustees, the board must ensure that the candidate has acknowledged that they have read the pamphlet, *What You Need to Know About Leadership & Governance in a Franciscan Sponsored Ministry*, The Purpose and Culture of the Ministries of OFM, and the purpose statement of the ministry.
4. Trustee interviews: Trustees require that a candidate recommended for ED receive a final interview with two FM members (not on the ministry's board) prior to appointment.
5. Recommendation for an ED should be sent to the Trustees in writing and include:
 - a. CV or Resume
 - b. Write-up and recommendation by the board including the candidate's experience or connection with Franciscan ministry and their expressed willingness to work within our governance structure and to engage in on-going Franciscan formation. It helps if it



addresses the key characteristics A-F below and describes areas where they will need development and the plan to provide it.

- c. Acknowledgement that the candidate read and understands, *What You Need to Know About Leadership & Governance in a Franciscan Sponsored Ministry*, The Purpose and Culture of the Ministries of OFM, and the purpose statement of the Ministry.
 - d. Notes on the feedback received from reference checks
6. Boards will be notified in writing of the Trustee's decision regarding a candidate's appointment.

It is helpful if the outgoing board chair provides support to the incoming board chair by not stepping off the board immediately.

Key Characteristics of an Executive Director

Each ministry will have different needs regarding the specific industry knowledge and skills their ED needs to successfully lead their ministry. However, there are certain characteristics that have been found to be good indicators of success. -The Trustees will heavily weigh the following:

A) Does the candidate identify as Franciscan? If not, what is their religious/philosophical orientation and how does it reconcile with a Catholic, Franciscan ethos.

B) Do they have prior involvement or experience with a Franciscan ministry? If not, what other kind of religious or non-profit experience do they have and how does it fit with our sponsored ministry?

C) Are they currently engaged in personal, ongoing, spiritual formation? Have they committed to participating in ongoing Franciscan formation?

D) Are they relationship oriented?

E) Do they have experience working with a board?

F) Do they possess the following skills/experience?

- Experience managing a diverse and multicultural staff to meet strategic goals
- Strong oral and written communication skills
- Collaborative management style
- Finance, HR, and strategy development experience consistent with the size and complexity of the ministry they will lead.



FRANCISCAN MINISTRIES GUIDANCE ON SELECTION & APPOINTMENT of BOARD MEMBERS

A Collaborative Process

Selecting a Board Member is one of the most important decisions our Trustees and Boards make. The process as described in the bylaws, is for the Trustees (FM) to appoint Board members. To do this, the Trustees generally rely on a recommendation from the board. Though the Trustees rely heavily on the board recommendation, it is the Trustees responsibility to make an independent assessment of the candidate before appointing them.

This guidance document is designed to answer the question: What are the general characteristics the Trustees look for when appointing a Board member? It will also outline some process considerations.

Process Considerations

1. Application - Trustees recommend boards have an application for prospective board members that allows them to provide information around those areas most important to the board.
2. Selection/Governance Committee-Trustees recommend that a FM member is on the committee and that the committee members have a complete and shared understanding of the ministry's two-tiered governance structure and this document before embarking on a search. Most importantly, there must be clarity around the fact that board members report to the Trustees and are entrusted with representing the Trustees. Without this understanding, it is easy for people to assume they are representing the ministries and not understand the larger context of their commitment to the Franciscan friars, the Catholic Church, and the worldwide Franciscan movement.
3. Candidate Acknowledgements: Before recommending a candidate to the Trustees, the board must ensure that the candidate has acknowledged that they have reviewed the PowerPoint on Governance, Mission & Tensions.
4. Trustee interviews
5. Recommendation for a new board member should be sent to the Trustees in writing and include:
 - a. CV or Resume
 - b. Write-up and recommendation by the board including the candidates experience or connection with Franciscan ministry and their expressed willingness to engage in on-going Franciscan formation.
6. Boards will be notified of a candidate's appointment (or reason for not appointing).

Key Characteristics of a board member:

Each ministry will have different needs regarding the specific industry knowledge and skills they need from board members but there are certain characteristics that the Trustees feel strongly about and weigh heavily in their deliberations. Please address these in your recommendation to the Trustees:



- A) The candidate has a basic understanding of Franciscan values.
- B) They have committed to ongoing Franciscan formation
- C) Their religious or philosophical affiliation is compatible with the Catholic faith
- D) They have prior involvement or experience with a Franciscan ministry or other kind of religious or non-profit.
- E) They have some form of board experience



FRANCISCAN MINISTRIES GUIDANCE ON DEVELOPING A STRATEGIC PLAN

A Collaborative Process

A Strategic Plan outlines the direction of an organization. It identifies how an organization will allocate their resources to achieve a desired future state.

Strategic Plans are created by each ministry and submitted to the Trustees (FM) for approval. This process is easiest when Ministries and Trustees begin a discussion at the start of the process. This document answers the question, what process and content considerations will the Trustees be weighing most heavily when considering a strategic plan for approval?

Process Considerations

1. Inclusion: Our ministries exist within the context of its local community, our Franciscan community ; and the worldwide Franciscan movement. They exist within time and are affected by micro and macro trends. We suggest that perspectives be solicited from a wide array of stakeholders.
2. Ongoing Dialogue: No one likes being presented with a “baked cake” and asked to rubber stamp it “approved”. Engaging the Trustees at the start and periodically throughout the strategic planning process will result in a dialogue that is likely to facilitate alignment and approval.
3. Financial Context: Strategies should be considered with the context of a financial forecast. During each budget cycle, ministries will be asked to clearly connect the budget to the strategic plan.
4. Plans are approved in whole. Objectives should be high level but with enough detail that Trustees are approving a plan not just a concept.
5. Ministries will be asked to present their strategic plan to the FM board.

Content FM will be looking for when asked to approve a Strategic Plan:

1. It is grounded in mission and Franciscan ministerial values (outlined in Strategic Planning Document approved by Definatorium in July 2021)
2. Its mission is aligned with the Provincial ministerial vision and guidelines for mission and Franciscan Identity.
3. It envisions collaboration and support of the province and other sponsored ministries
4. It meets identified needs of the local community within the context of the “signs of the times”.
5. It identifies the strengths and weaknesses of Content of the programs and initiatives and ensure they are of a sufficiently high quality prior to recommending new ministry programs or initiatives.
6. It is financially sustainable
7. It contains SMART goals:
 - S - specific
 - M - measurable
 - A - assignable
 - R - realistic
 - T - time-related



STRATEGIC PLANNING – Province of St. Barbara Sponsored Ministries

Strategy is how our mission gets expressed. It reflects our identity and values and determines our use of resources. Best practices encourage engagement with the Province at the start of the process to help ensure and facilitate that the strategy is aligned with the Trustees vision and will be accepted and approved.

PLANNING PROCESS

Whatever process a ministry chooses to follow, it should be framed by our Franciscan principles (theology). These principles are used as lenses which guide our thinking and keep us aligned with our Franciscan mission.

Review these principles and identify which are particularly relevant to the topics under consideration before kicking off discussions. Revisit them as your planning progresses and again before final decisions are arrived at. Using these lenses will help keep our ministries aligned with our Franciscan identity and mission and make the approval process from Trustees much smoother.

Franciscan Principles/Lenses used in Strategic Planning and Decision-Making.

1. Relationship – Recognizing, valuing and deepening our relationship with the people in our ministry, family, Province, sister and brother ministries, the Catholic church, our environment and community is central to who we are. Our decisions are understood within the context of all these relationships.
2. Personalism/Particularity – We serve people as individuals; serving individuals with a “personal touch” is valued more than serving a greater number of people but with a less personal touch. This biases us toward what is smaller rather than what is bigger.
3. Poverty & Non-Possessiveness – We don’t cling to “things” as our own - as our ministry’s. What we have is generously shared with others who are in need including the poor, the powerless, staff and volunteer programs, the friars, the Province, other ministries and the greater community. Similarly, we don’t cling to our strongly held opinions, we let them go to make room for other possibilities.
4. Limitations – Only God is infinite. We are finite. Societies needs are never-ending. Since we are limited, we focus on serving the needs of those we can with the resources we have and while maintaining personal contact with each person we serve. We are satisfied with that.
5. Generosity – What we have is to be given away. We can do this with confidence because we trust in the Providence of God and the goodness of others. Generosity helps us meet the needs of others.
6. Interdependence – We value our interdependent with others. We neither value nor attempt to be independent. We rely on donors, volunteers, the community, the friars, Province and others. We consider the impact of our decisions on our sister, mother earth, as well as on sentient beings.



7. Justice/Advocacy – When we talk about justice, we are talking about improving the dignity and agency of the poor and those lacking power in society. Because of our focus on particularity, our acts of justice are usually (though not exclusively) focused on individuals rather than systems. (For a fuller understanding, see Joe Chinnici’s paper on Advocacy)

8. Growth – In contrast to capitalistic, Franciscan’s do not place any inherent value on growth. See position paper on growth for a fuller exploration of this topic.

9. Beauty – Beauty is central to our lives. Each individual is both artist and scientist. We approach our decisions and work as works of art. We examine the play between light and darkness. Right actions are always born of love and call attention to beauty.

10. Economics/Money – The resources we have, and which are needed to run our ministry are ours to use, but our excess does not belong to us. It is meant to be given away to others who are in need.

11. Individuals as Spiritual Beings – We believe all individuals seek communion with the center of all being, which we call God. Our work, including programs, supports spiritual development.

12. Subsidiarity – People who will be significantly impacted by a decision should have a voice in the decision. St. Clare tells us that it is often the youngest who know what is better. Our leadership style should reflect a commitment to subsidiarity despite its inefficiency.

Other helpful resources include:

1. The Franciscan Discernment Model (Appendix A)
2. Position Paper on Growth (Appendix B)
3. Fr. Joe Chinnici Notes on Advocacy (Appendix C)
4. Bill Short’s Ministry Video Series
5. Mission Integration Website www.franciscanmissionintegration.org



Appendix A

A Franciscan Discernment Model

Created by Mary Beth Ingham C.S.J., based on the moral theology of Franciscan theologians St. Bonaventure and John Duns Scotus. Mary Beth Ingham is a highly respected scholar and a faculty member at our Franciscan School of Theology.

When faced with a strategic or complex ministry decision, discernment is often required. What's the difference? **Decision-making** is straightforward. We consider options and choose the one that best meets our goal. **Discernment** is about deep listening and responding to that which is interior. It is more inclusive and encourages feelings and the discovery of unexpected choices.

Before beginning a discernment process, it is important to clearly define the decision being considered. Is it how should we spend the \$2M gift we just received, or is it, what are our strategic priorities and how do we best to align our resources with those priorities?

Discernment Process:

This discernment process is based on the insights of Franciscan theologians, St. Bonaventure and John Duns Scotus, as well as modern-day Franciscan moral theologians. Sr. Mary Beth Ingham C.S.J. has developed their thinking into this five-step process.

1. Be expansive and inclusive

Create a larger circle of stakeholders, of options, of viewpoints. Invite others to join the process. We are in relationship with others who will be deeply affected by our decision. How can we include them in this discernment?

2. Emotions are morally relevant

Throughout the discernment process, pause frequently and ask participants how they feel about the process, information and options being discussed. Feeling alone are relevant, people should not be required to justify or explain their feelings.

3. Be creative

Think big as if anything is possible. Move outside conventional thinking. Look at the issue from multiple perspectives. Consider the possibility of moving in the opposite direction of the most popular options. Bring light and beauty into the process.

4. Be faithful

As Franciscan ministries, our decisions should always be considered through a Franciscan lens. Scan the Franciscan principles above to see which apply to the specific issue your ministry is discerning. Use these lenses to assure that your decision will be aligned with our Franciscan identity.

5. Know when to act

Discernments shouldn't be rushed but they also shouldn't be prolonged. Creating pauses of days to weeks gives people time to sit with the decision and further process it. However, the key consideration of when to act should be driven by the needs of those affected by the decision. In our case, staff, those we serve, friars, volunteers, the Province, and the local community.



Appendix B

Position Paper and Process for Considering Strategic Growth Initiatives

The Franciscan Perspective on Growth:

- In contrast to capitalism and consumerism, Franciscan's place no inherent value on growth.
- Our bias is toward smaller, personal organization where everyone knows each other.
- We do not see the world as a problem that has to be solved. Therefore, we are not driven by a need to fix things.
- This sometimes means that we don't respond to large important issues in our communities. Community need alone is not a reason for us to grow. It is not that we don't recognize the need or support others in responding to it, we simply know that not everything is "ours to do."
- Instead, our focus is on the individual, and what we describe as personalism.
- We give our attention to the individual in front of us. Attention, compassion and respect to each individual are valued over providing services or programs to the individual.
- We accept limitations. In solidarity with the poor, we accept that organizations sometimes experience their own poverty by not getting the things they want. This is not based on a sense of scarcity but on a sense of interdependence that requires we make choices based on the big picture and on needs and desires other than our own – even our desire for good.
- Expanding programs, acquiring additional space, and adding new offerings are considered desirable when they are aligned with our mission, better serve our constituents, can be fully funded and enhances our ministry's ability to engage in personal, family-like relationships and interactions.

When considering issues of growth, we ask ourselves:

1. What makes growth attractive?

We drop our cultural bias toward growth and examine what is driving our desire for growth? Community need? Available Funds? Neither of those alone is enough. Growth should be attached to our mission and ability to better serve our clients/customers/parishioners/Province.

2. Can we handle growth right now?

Are we currently well-organized? Are key positions filled and departments meeting the needs of all our current constituents. Do we have succession plans in place and people sufficiently developed to step into key roles? Can we fund this growth now, and sustain it in the coming years? Growth should only be considered in ministries that are stable, meeting the needs of heir constituents, well-funded, and which have management and volunteer bench strength.



3. Are we the best organization to take this on?

We consider the bigger picture and our larger community landscape. In light of the Province, other ministries, other community organizations expertise and adjacency to the issues under discussion as well as our own expertise and resources, are we the best ministry to take on this growth or are others better positioned?

4. Would it be better to shrink rather than grow?

The “coincidence of opposites” suggests that we consider the opposite solution to the one we are first attracted to. We consider if it is possible that the best way to meet the need we are examining would be to let go of a program or offering, spin off a division or use our resources to help fund another group to take on the initiative. Saint Clare often turned women away from her convent and encouraged them to start one of their own. She limited growth in her convent but encouraged others to establish them. We consider if empowering others is a better alternative than taking on more ourselves?

5. Will it aid us in maintaining or improving our level of personalism?

The most fundamental characteristic of our Franciscan culture is that we are grounded in right relationships and a commitment to personalism. Will the personal touch we provide our constituents be in any way diluted by growth? If so, it is unlikely that growth should be pursued. If it will enhance personalism, this may be a signal that growth is warranted.

6. Is the growth under consideration consistent with the Catholic faith (magisterium) and our Franciscan mission and values? We take a deep and nuanced look at what we are considering and proceed only when we are confident that it is fully aligned with both.

This process should not be rushed. After discussions, there should be a period of time for people’s continued personal reflection and prayer before revisiting the discussion and determining whether or not to make a recommendation for growth to the Province Trustees.



NOTES ON ADVOCACY from Fr. Joe Chinnici to Barry Sargent

Barry

I like the basic principles very much. I would suggest a couple of additions to this very positive vision. I am particularly concerned that SAF advocacy not follow the dominant cultural patterns of political and rights advocacy groups; it requires in our present cultural context a real conversion of thinking and acting, and in that sense stands over against and separate from other types of advocacy. It is not that these other types are not well meaning and good; it is that we have something different to contribute and need to clarify in that sense our specific difference, our mission in society in this area. You have well identified it in these slides on a conceptual level, I would look to also find guidelines that engage our distinctive methodology. Something along these lines, although I know that will take dialogue and discussion so as to come to an understanding. This is my own thinking right now.

If advocacy moves from a position that recognizes:

- The beautiful in all creation and creatures
- approaching others not as enemies but as **friends** who might share the vision
- **moves into shared benefit as its goal, mutuality, and a civic community of brothers and sisters**
- extends reconciliation to all
- appreciates all as a gift
- has reliance on God's continual action in the person, the community, and history

Then, HOW ADVOCACY IS DONE, its methodology of action, BECOMES VERY IMPORTANT. For examples,

1. Advocacy in a Franciscan mode engages in actions that advocates FOR THE POOR AND THEIR DIGNITY but presupposes good will on the part of all and uses methods that consciously create more respect, mutuality, and relationality between all the participants, even those in opposition;
2. Advocacy in a Franciscan mode leaves room for the incompleteness of human action with the hope that although our actions are limited, they begin a PROCESS OVER TIME that bears fruit in God's time; we are sowers not harvesters, patient creators not redeemers;
3. Advocacy in a Franciscan mode prefers to lead more by EXAMPLE than argument, more by A CONVICTION OF HOPE than by a commitment to absolute justice, more by A PROPHECY OF AFFIRMATION than by a prophecy of denunciation, more by THE TELLING OF STORIES than by systemic logical analysis, more by a FOCUS ON MUTUALITY than by an insistence on individual perspectives;
4. Advocacy in a Franciscan mode presents an ALTERNATIVE WAY and VISION OF COMMUNAL HUMANISM THAT critiques by WORD AND EXAMPLE a cultural advocacy that is divisive, oppositional, and uses pressure tactics to achieve an assertion of political power or individual rights based on binary oppositions (oppressor/oppressed, rich/poor, indifferent/engaged, conservative/liberal, male/female, gay-straight-lgbt, republican/democrat, capitalist/socialist. The Franciscan way is not binary but both/and or polyvalent.
5. Advocacy in a Franciscan mode, cautious of supporting issue driven interventions in a divided society, partners with others SO AS TO ENGAGE THEM in this larger social vision of COMMUNAL HUMANISM. The positions it takes are aimed to create COMMUNAL PEACE.

In *EVANGELII GUDIUM* in his chapter on social relationships Pope Francis establishes four principles that seem to me to capture part of our approach: reality is more important than ideas, time is greater than space, the whole is greater than the part, and a fourth one I cannot think of at the moment. Are you familiar with these passages?



There is one story I am thinking of here from our sources; I do not have the reference with me, but it details the issue of advocating from public argument (done by a Dominican) and advocacy by example (Francis). I can get the story for you. It would be a good starting point for a discussion, as Francis is asked to denounce the evils he sees but does not do that. The greeting he offers and the methods he uses are designed to establish the maximum amount of peace possible. What has struck me in our sources, is that although Francis sees the problems of society and church, he does not denounce them, but engages in a different mode of action in a cultural situation of divisiveness and argumentation. This is what I am trying to express above.

I hope this makes some sense; if anything, it will engage a discussion. I like what you have done. These are my additions. What do you think?

Thanks for asking. Joe

