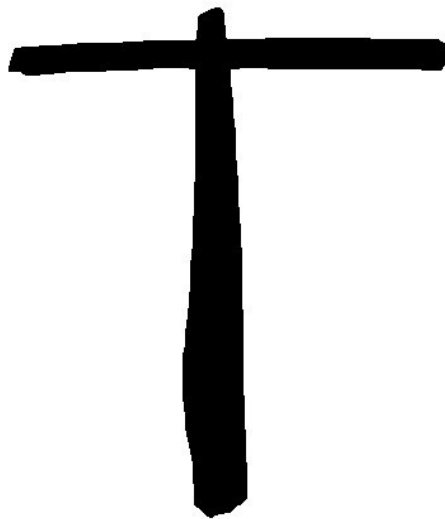


**The Third Order of the Society of Saint
Francis
(European Province)**



Area Team Handbook V.3

(Revised June 2017)

This document has been revised by Rona Duncan
for the European Provincial Chapter of TSSF in 2017.

Introduction to the Area Team Handbook

This is the third edition of the Area Team Handbook which is a substantial update to the Handbook originally issued in 2003. All previous versions are now obsolete.

It is a reference resource for Area Teams with regard to statutory obligations and their responsibilities and roles. Also, to provide a knowledge base to assist in dealing with issues that the Area Teams frequently need to deal with.

We have tried to balance between the desire for simplicity and the need to keep a light touch on processes and procedures with some formality and light guidance for Area Teams.

The Handbook should be part of the induction for new members of the Area Team. Please pass on to your successor when they take over.

Handbook Sections

- Part A - Area Team
- Part B - Statutory Obligations and guidance
- Part C - Tertiaries
- Part D - Appendices

Note: Underlined words in blue denote clickable hyperlinks (within the document), e.g. from the index to each section and from each section back to the index.

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Section A

Introduction

Area Team Elected Members, Appointed Officers and Sub Groups

An Area Team will work at its best by developing a strong sense of mutual support and the sharing of tasks which inevitably will sometimes overlap. The Team has a corporate responsibility for the on-going life of the Third Order family in its Area.

It is important that when tertiaries stand for election to office or for appointment that they are given a copy of the Job Description of the particular role.

The various roles of the members of the Area Team are specified in the following Job Descriptions. It is recognised that each individual will develop their role accordingly to their particular abilities.

Elected Officers

The two Officers who are elected by the Area are the Area Minister (AM) and the Area Formation Guardian (ANG)

Compulsory Appointed Officers

The tenure for Compulsory Appointed Officers should be in line with those set out for Elected Officers and are required to attend Area Team Meetings.

They are: -

Area Novice Guardian, Area Treasurer, the Area Secretary and Local Convenors.

Optional Appointed Officers

These officers attend Area Team meetings only by invitation with the Agreement of the Area Team and the approval of the Area Minister. It is recommended that tenure is in line with those set out for Elected Officers.

Sub Groups

These should only be constituted for a specific task and timeframe. Care should be taken to give such a group a clear Remit, timescales, reporting requirements and if relevant a cost budget.

Statutes References

Statutes 5.1 and 5.2 for details of Election and Appointment of Office Holders.

Statutes 2.4 ff. for the Responsibilities of the Area Team as a whole.

The following breakdown of various Team Members' tasks should always be seen in the light of 2.4 ff. guidelines.

Office Vacancies

A vacancy will occur at the end of the term of office or when an officer resigns during their term for both appointed and elected officers.

1. End of Term of Office

The Area Team should commence the process of finding a successor in time to enable a handover period to the new officer which should include as a minimum attendance at one Area Team Meeting, in the case of officers who are required to attend the Area Team Meeting.

2. Casual Vacancy

Where an officer resigns during their term of office the Area Team should ensure that a successor is found as soon as possible. Where a handover is not possible the Area Minister should ensure that additional support and training is given.

3. Long Term Vacancies

Areas can be faced with long term vacancies on the Area Team which can lead to difficulties in carrying out the particular responsibilities of the officer when there is no one in post.

Officer	Assigned Deputy	Comments
Area Formation Guardian	Area Novice Guardian	
Area Novice Guardian	Area Formation Guardian	
Area Treasurer	Area Minister	Or another bank signatory
Area Safeguarding Representative	Area Minister	
Local Convenor		See separate note
Area Minister		See separate note

3.1. Local Convenor

If the Local Group cannot find a Convenor then they should apportion out the tasks of the Convenor. There should be a contact person, a nominated representative to attend the Area Team Meetings (ATM), an agreement within the Local Group on their programme as a minimum.

3.2. Area Minister

Where an Area Minister vacancy occurs either at the end of term or as in a casual vacancy and there is no immediate successor the Area Team must decide how to administer the Area.

The definition of immediate successor is that no one has been appointed for three months following the vacancy and that there appears to be no prospect of a successor.

The solution should be one that is practical for the particular Area and their needs.

The Link Tertiary(LT) should be informed and is there to offer advice, training and support. In certain circumstances, it may be helpful for the LT to attend and/or be a neutral chair to discuss the best solutions for the Area.

3.2.1. Suggestions are made below: -

- Appoint a caretaker Area Minister for a maximum period of one year This person may be on the Area Team or another suitable Tertiary. This would not entail an election but an acceptance from the majority of the Area Team.

If this is not possible then the Area Team should consider breaking up the responsibilities to various members of the Team.

- Area Team Meetings Chair

The Area Team agree for one of their number to chair the ATM meetings and to agree the Agenda with the Secretary.

- Area Days

Planning can continue in the ATM with regard to dates and themes and responsibility for arranging speakers could be delegated to the Secretary. It is assumed that the Secretary already books the venue.

- Liaison and reporting to Link Tertiaries and Province

The Area Team agree for one of their number to be named as the contact and take this responsibility.

- Safeguarding

If the Area Minister is currently carrying out this role as there is no designated officer then the Area Formation Guardian should take responsibility.

- Other responsibilities

These should be addressed as required and delegated appropriately.

3.3. Unfilled Vacancies in Other Roles

The table gives recommendations as to assigning responsibilities on a temporary basis. It is also possible to appoint a caretaker to a post with the recommended guideline that such a tertiary is appointed for a maximum period of one year. Every effort should be made to find a permanent officer holder during the period.

Handover and Induction of Area Team Officers

Area Team members change on a regular basis and it is important that the changeover is managed in the best possible way available. This will vary according to the circumstances of succession.

At Change of Officers ensure that any Tertiary standing for a given post is in possession of the Job Description for the role and they are also directed to obtain a copy of the Area Team Handbook from the TSSF Website.

Handover

- If a tertiary is completely new to the Area Team then it is advisable for them to attend a meeting as an observer before taking up the role as an observer. This helps the Officer Elect to understand how the meetings function and their own role within it.
- If a tertiary has previously served on the Area Team in another role this handover is useful in that he/she can get up to date on current matters before the Area Team meeting, but this is not essential.

Induction

- With the exception of Local Convenors there should be a meeting with the previous incumbent to hand over current documents and files. These can be electronic as well as paper.
- This could also, for the ANG, include training materials and Novice notes
- The Area Treasurer will need to handover the Cash Book and update to date Bank Statements. The Bank Statements should have been fully reconciled with the Cash Book before or at Handover.
- The current Area Treasurer should obtain a new Bank Mandate
- The Officer Elect must be fully briefed on the way the role has been previously conducted and any current problems or arrangements.
- The local Convenor should brief the incoming Convenor of any pastoral or particular needs of the Local Group.
- The Area Safeguarding Officer should brief the Officer Elect about any outstanding training required and any liaison ongoing with the Provincial Safeguarding Team
- The Area Safeguarding Officer elect should have, or immediately process a Disclosure and Barring Service (DBS) check, and arrange for any necessary training.

Notifications and Actions

- The Areas Secretary should: -
Provide the Diary Dates of Area Team Meetings and any relevant Provincial meetings to the Officer Elect.

Notify the changes in Officers to the TSSF Membership Secretary

Notify both the Justice, Peace and the Integrity of Creation (JPIC) co-ordinator and the Provincial Safeguarding Representative of the change in appointed officers.

- Current Area Treasurer should; -
Obtain a new Bank Mandate for the changeover and also at the first available meeting of the new Treasurer a Area Team Minute must be passed and a copy provided to the incoming Treasurer to take to the bank with the Mandate.

Area Minister

The Area Minister has overall responsibility for the life of the Area.

Accountability

To the Area Team and via the Link Tertiary to Chapter

To be elected for a period of three years with the option after discernment to serve for six years

Tasks

- Area Team
 - To lead the Area Team.
 - To support and enable all the members of the Area Team in their roles.
 - To hold regular Area Team Meetings
 - To provide the Agenda of Area Team Meetings in consultation with the Area Team
 - To lead the Area Team in an annual Area Review following Francis-tide.
 - To Act as Safeguarding Representative if the post is vacant.
- Area Meetings
 - With the Area Team to agree on the frequency of Area Meetings and to plan and facilitate them.
 - To ensure that the Area meets together at least once a year at Francis-tide with, as far as possible, all Tertiaries present, for the annual renewal of vows.
 - With the Area Formation Guardian to ensure that corporate worship is integral to the life of the Area.
 - With, and as one of, the Area Team to foster the pastoral care of all Tertiaries, postulants and aspirants in the Area.
- Novicing and Professions
 - To ensure that opportunities are provided for the novicing and profession of new Tertiaries.
 - With the Area Team to approve Novicings, Professions, Leave of Absence, and Release from Vows, subject to Provincial Chapter's ratification.
- Local Groups
 - With the Area Team, to encourage creative life in the Local Groups, and to deal with any problems which arise.
 - With the Area Team to approve the splitting, or amalgamation of Local Groups.
- Cluster and Province
 - To Liaise with the Link Tertiary as follows: -*
 - Provide the Link Tertiary with a written Annual Area report for the attention of Chapter as requested by the Link Tertiary, and liaise as necessary verbally or in writing.
 - To make contact with neighbouring Area Ministers, whether or not in the same Cluster, to plan joint events and share resources where appropriate and beneficial.
 - To ensure that there is a designated member of the Area Team with responsibility to see that information of interest from the Area and Local Groups is included in Third Order News (TON).

Area Formation Guardian

Has the responsibility for furthering the growth and formation of all Tertiaries in the Area in the ways of Franciscan spirituality.

Accountability

To the Area Team and Provincial Formation Guardian

To be elected for a period of three years with the option after discernment to serve for six years

Tasks

- To work with the Area Minister to ensure that corporate worship is integral to the life of the Area.
- To take pro-active steps to encourage the growth and formation of all Tertiaries in the Area.
- To keep in touch with the Provincial Formation Guardian on formation matters and encourage the use of any material which might be produced.
- To produce the content for Section B of the Annual Area Report to the Link Tertiary.
- When 'release' from the Third Order is under consideration, to ensure an adequate and prayerful review of the matter and present the names, when appropriate, to the Area Team.
- In consultation with the Area Minister, Area Novice Guardian and appropriate Local Group Convenor to present the names of any in need of pastoral support to the Area Team for decision and action.
- To ensure that all Tertiaries in the Area make an annual review of their life and Rule, receiving reports as appropriate.
- To ensure that all Tertiaries present themselves and their Rule of Life for their annual renewal and when this cannot be done at the appropriate Area Meeting to ensure it is done in the company of other Tertiaries at some other time.
- To ensure the provision of Retreats and Quiet Days as appropriate.
- When necessary to assist Tertiaries in finding an appropriate Spiritual Director.

Appointed Posts

The following role descriptions are for posts which are appointed by the Area Team.

Compulsory Appointed Posts

Area Novice Guardian
Area Treasurer
Area Secretary
Local Convenors
Area Safeguarding Representative **

These Appointed Members must attend the Area Team Meeting with the exception of the Area Safeguarding Representative who can attend as necessary.

Optional Appointed Posts

These are optional and report at or to the Area Team as appropriate.

Area Novice Guardian

Ensures the appropriate growth and formation in the ways of Franciscan spirituality of all Aspirants, Postulants and Novices in the Area, and is responsible for their care.

Accountability

To the Area Team and Provincial Novice Guardian

To be appointed for a period of three years with the option after discernment to serve for six years.

The Area Formation Guardian is expected to recommend to the Area Team a tertiary suitable for the post.

Tasks

- Enquirers
To be the focal point to whom Enquirers are directed.
To interview the Enquirer to ascertain if they have a vocation to the Order.
To arrange with the appropriate Local Group Convenor for the candidate to visit, and subsequently be attached to, a Local Group.
To liaise with the Convenor over the appointment of someone within the Local Group to act as a 'friend' to the candidate, when thought necessary.
To allocate Enquirers to an appropriate Novice Guardian.
To approve the selection of an appropriate Spiritual Director for each candidate.
- Novice Guardians
In consultation with the Area Team to appoint Novice Guardians as necessary and encourage and support their ministry.
To arrange occasional meetings of all Novice Guardians and when appropriate of Novices.
- Postulants, Novices
With the Area Formation Guardian to plan adequate training opportunities for Novices, including at least an annual meeting on St. Francis and St. Clare, which all professed may also come to.
To consult with the Novice Guardian and present the names of those thought ready to go forward as Postulants and as Novices to the Area Team.
- Profession
To consult with the Convenor and then with the Novice Guardian to present the names of those thought ready to go forward to profession to the Area Team.
In consultation with the Area Formation Guardian to approve the Rules of Life of those ready for profession.
On the Area Team approving a name for Profession, to forward that name to the Link Tertiary for ratification by Provincial Chapter.

If ratified, subsequently to notify the Administrator of the Profession having taken place.

- Record Keeping

To record all details of Aspirants

To record details of Postulants, pass the information to the Area Secretary for the Area Address list, and then to send the form on to the Provincial Database Administrator. (membership Secretary)

To record details of Novices pass the information to the Area Secretary for the Area Address list, and then to send the form on to the Administrator.

- Training materials

To order and hold adequate stocks of information material and training material.

(See Website Appendix)

Area Treasurer

To manage the Area Finances

Accountability

To the Area Team and Provincial Treasurer

To be appointed for a period of three years with the option after discernment to serve for six years

Tasks

- As a full member of the Area Team to share in all decision-making and pastoral care.
- Area Treasurers Guidelines
To carry out the duties below according to the parameters set up in the above Guidelines.
- To receive all income in the Area which will include Area Day donations, Retreat income and requested income from the Provincial Treasurer.
- To administer the Area's Bank Account ensuring that all cheques drawn on the account require two signatures as authorised by the Area Team, excluding the person in whose favour the cheque is drawn.
- To have authority to process financial transactions by internet banking.
- To reimburse expenses incurred by Area Team members, against written and signed claims, where possible supported by appropriate documents.
- To draw up a yearly budget with the Area Team and at least twice yearly provide a short statement to allow monitoring by the Team.
- To prepare an annual account each year in the form prescribed by the Provincial Treasurer by the due date requested by the PT.

Area Secretary

To provide Secretarial assistance to both the Area Minister and the Area Team

Accountability

To the Area Team and the Area Minister

To be elected for a period of three years with the option after discernment to serve for six years

Tasks

Area Meetings

- To liaise with the Area Minister with regards to the Agenda for Area Team meetings and produce the Agenda and circulate if the AM requires.
- To produce minutes of every Area Team Meeting and after AM approval circulate to Area Team Members.
- As a full member of the Area Team to keep full records of decision making and pastoral care, when appropriate.

Records and Notifications

- To keep up to date full records of all Tertiaries in the Area and to produce an intercession sheet of their names.
- To notify the Provincial Database Administrator (Membership Secretary) of any changes of detail, name, address etc of Tertiaries in the Area.
- To notify the Provincial Safeguarding Officer of the appointment of the Area Safeguarding Officer. If the post is vacant the PSO must be informed that the Area Minister is acting in this capacity.

Circulation

- To circulate all necessary documentation to the Area including TON, election papers and address lists.
- To circulate the Link Tertiary's Chapter reports to the Area Team.
- To book Area Day Venues if required.
- Where possible to assist Tertiaries moving out of the Area to make swift contact with their new Area.

Local Groups Convenor

To lead the local group and support the members pastorally

Accountability

To the Area Team

To be appointed for a period of three years with the option after discernment to serve for six years

Tasks

- Area Team
A Full member of the Area Team and to participate in all decisions and attend all meetings
To report to the Area Team on the Local Group as to activities and pastoral concerns.
- Local Group
To keep in touch with all members of the Local Group.
To arrange for the Local Group to meet regularly and as frequently as they together deem fit.
- Local Group Meetings planning
Work with all Local Group members to:-

Arrange a venue which is warm, large enough, and accessible.
Plan the programme with sufficient Franciscan content.
Include time for prayer, for socialising and the exchange of news.
To help the Group to grow in mutual support, nurture and formation.
Facilitate smooth running and time keeping.
Build up trust, and growth.
To welcome newcomers, enquirers and postulants and ensure that, where necessary, they have a 'friend' in the Group.
To ensure that members absent for whatever reason are cared for and encouraged to feel that they belong.
To help the distribution of TON and the inclusion in it of local news.
To pray for the Local Group members and encourage an atmosphere of mutual prayerful support.

Area Safeguarding Representative

Accountability

To the Area Team

This is an appointed post by the Area Team and subject to the approval of the Provincial Safeguarding Team

It is recommended that the Representative be appointed for a period of three years with the option after discernment to serve for six years.

Training

The Area SGR will have /had suitable training supported with guidance from the Provincial SG Team

The Area SGR must undertake a Disclosure and Barring Service (DBS) check to show they that they have no previous relevant convictions.

Tasks

- To use all best endeavours in promoting safe working practice across the Area as described by the Provincial Safeguarding Policy
- To raise general awareness of risks and possibility of abuse so that everyone is confident and secure in all settings with sisters and brothers.
- To inform and give guidance to Local Convenors and Area Officers
- To assure all members of the Area that if any safeguarding concerns arise, or disclosures about abuse are made, all such issues must be passed direct to the Provincial Safeguarding Officer or Chapter Lead who will offer advice and support. No investigation, review or reporting should be considered in the Area.
- To be responsible for ensuring that Tertiaries expected to apply for DBS or in the Irish Republic Garda Vetting clearance check do so.
- To be a regular attender at Area Team Meetings so that advice and awareness are a full part of practice in the Area.

Area Retreats Secretary

Has the responsibility for organising, booking and collecting payments for Area Retreats

Accountability

To the Area Formation Guardian, the Treasurer and the Area Team

This is an appointed post by the Area Team.

It is recommended that the Secretary be appointed for a period of three years with the option after discernment to serve for six years.

Tasks

- To research and suggest a retreat giver and programme, venue and date for an Area Retreat for the approval of the AFG and the Area Team.
- To publicise the Area Retreat
- To maintain a list of the Retreatants and payments received.
- To maintain a waiting list if required

- **Financing a Retreat**

The following responsibilities may be carried out by the Area Retreats Secretary or the Area Treasurer.

- Deposits and balances

A deposit must be paid by all retreatants by a specified date which is generally non – refundable.

The Balance must be paid by the agreed date

- Payment of deposits and balances

May be made by the following ways

By cheque

in which case they must be recorded and paid into the Area Bank account by arrangement with the Area Treasurer.

By bank transfer

paid directly into the Area Bank account. If so they must be clearly marked in an agreed Reference format e.g. Surname and name of Retreat. In the case of a common surname the first initial should also be on the reference.

By payment direct to the retreat house

If payment is made either by bank transfer or direct to the retreat house then the retreatant should notify the Area Retreats Secretary and the Treasurer preferably by email of the payment.

Deposit or balances held in the Area Bank Account

Payments to the Retreat House should be made by the Area Treasurer on request of the Area Retreats Secretary either by cheque or bank transfer.

- Cancellations – deposit paid only

If only the deposit has been paid and a replacement Retreatant is found then the deposit can be refunded.

If no replacement is found and the deposit has already been paid to the Retreat house it is not refundable.

- Cancellations – full balance paid

Refunds can only be made if either the Balance has not yet been paid over to the Retreat House or the Retreat House is willing to refund the Balance Payment.

However, it is recognised that there can be exceptional circumstances due to ill health, personal circumstances and death where it is appropriate for the Area to refund monies even if the payments are not refundable by the Retreat House. The emphasis is that it must be a serious issue and not a cancellation due to simple ailments or circumstances.

Further guidance on deposit and balance payments may be found in Section B under Finance Guidance for Area Treasurers.

Area Pastoral Co-Ordinator

Has the responsibility for pastoral matters as delegated by the Area Team

Accountability

To the Area Formation Guardian and the Area Team

This is an appointed post by the Area Team.

It is recommended that the Representative be appointed for a period of three years with the option after discernment to serve for six years.

Training

The Area Pastoral Co-ordinator must have /had suitable training in Safeguarding awareness from the Area Safeguarding Officer.

The APC must have some recognised pastoral skills and or some formal training in pastoral work.

The APC must undertake a Disclosure and Barring Service check to show they that they have no previous relevant convictions.

Tasks

- To be guided by the provisions and practice of the Provincial Safeguarding Policy and the Area Safeguarding Officer.
- To notify the ASGO of any tertiary who is involved in pastoral work who requires a DBS.
- To report and document to the Area Safeguarding Officer any disclosure or concern
- To form a team of Tertiaries to undertake pastoral care.
- To maintain a list of the Pastoral Team with their availability and where appropriate their particular responsibilities with regard to any individuals.
- Pastoral Care
Tertiaries needing pastoral care should be passed to the Pastoral Co-ordinator by the Area Team or the Area Formation Guardian.
Any names passed by other individual should be verified with the Area Team.
- Ensure all tertiaries who require pastoral care from the Pastoral Team are visited and cared for according to their needs regularly.
- To inform and give guidance to Local Convenors in pastoral care.
- Report to the Area Formation Guardian and the Area Team as required

Area JPIC Representative

Has the responsibility for ensuring that the issues of Justice Peace, Integrity and Creation (JPIC) are appropriately highlighted to the in the Area.

Accountability

To the Area Team

This is an appointed post by the Area Team.

It is recommended that the Representative be appointed for a period of three years with the option after discernment to serve for six years.

Tasks

- To attend Area Team Meetings at the discretion of the Area Minister. The JPIC Steering Group recommends that the Representative is included with the Area Team so that matters of justice, peace and the community of creation are integrated with the work of formation, ministry and The Principles.
- To circulate via Area Convenors, and others, matters of interest highlighted by the JPIC Steering Group.
- To take pro-active steps enabling all Tertiaries to stand for justice and peace with all creation in faithfulness to our Franciscan Rule, personal and community.

Area Team Meetings - Topics, Responsibilities and Frequency

The Agenda for meetings will vary in terms of what is needed to be reported on or to be discussed. A model Agenda is included for an example. It is important that each member understands who reports on what and the general topics for mutual decision/discussion. See below for a guide.

<p>Area Minister <i>To agree the agenda prior to the meeting</i> <i>To conduct the meeting</i> <i>Current and ongoing events and issues</i> <i>Chapter Report from Link Tertiary</i> <i>Requirements/reports from Province</i></p>	<p>Area Team <i>Review of minutes of meetings</i> <i>Planning for future Area meetings</i> <i>Special events</i> <i>Area Retreats</i> <i>Safeguarding</i> <i>JPIC issues</i></p>
<p>Area Formation Guardian <i>Annual reviews, reports and renewals</i> <i>Outstanding annual reports</i> <i>Tertiaries whose pledge has lapsed</i> <i>Authorisation of absence</i> <i>Review of leave of absence</i> <i>Request for Withdrawal</i></p>	<p>Treasurer <i>Finance</i></p>
	<p>Secretary <i>Take Notes of the Area Team Meetings</i> <i>Booking Area Meeting Venues</i> <i>Forthcoming elections</i> <i>Correspondence</i></p>
<p>Area Novice Guardian <i>Enquirers</i> <i>Discernment of admissions to Postulancy</i> <i>Discernment of admissions to novitiate</i> <i>Progress of novices</i> <i>Training for novices and guardians</i> <i>Elections to profession</i></p>	<p>Convenors <i>Local group programmes and initiatives</i> <i>Changes of group membership</i> <i>Pastoral concerns and celebrations</i></p>

Frequency

There should be a minimum of two Area Team Meetings and preferably three per year if possible. It is difficult in some Areas because of the distances Officers have to travel but if there is not enough time to discuss matters properly then there is a considerable danger of a very heavy and unreasonable burden falling on the Area Minister to ensure the Area is administered properly.

TSSF – AREA TEAM MEETING
to be held at
LOCAL
on
DATE AND TIME

A G E N D A

1. Welcome and prayer
2. Apologies:
3. Matters arising from Team Meeting held # date
4. Reports:
 - 4.1. AFG
 - 4.2. ANG
 - 4.3. Treasurer
 - 4.4. JPIC
 - 4.5. Convenors
 - 4.6. AM
5. Planning for Area Day
6. Other business
7. Next meeting:
8. Close meeting

Planning an Area Day

The Area Team should plan the Area Day and delegate tasks as necessary.

Frequency

Most Areas have two meetings, some have three and exceptionally some may have four per year. Two Area Days is regarded as a minimum usually one in the Spring and one at Francistide. It is up to the Area Team what they judge as suitable for their Area taking into account distances and resources for organising the meeting.

Venue

•Location

This can be a central one or the Area may choose to vary the location to differing parts of the Area. In addition, consideration of parking, access and sound systems (where relevant) should be made. It is also recommended that churches with fixed pews should be avoided if possible.

•Layout

This is important as consideration of hearing difficulties and ease of participation should be made. Changing the layout of seating for different types of meetings can make a major difference in atmosphere and flexibility on the day.

Content

This is entirely flexible but generally should include the following: -

- The Area Minister should conduct the Meeting and in addition give any news or notices for the Area
- Sharing of news from Local Groups
- Celebration of the Eucharist
The format of the liturgy can be a local one. If so please ensure that all tertiaries have copies and that there are spares at the Area Day
- Renewal of Vows of Professed tertiaries should take at the Francistide meeting.
- Speaker or an activity or topic
- Refreshments available at the beginning of the day, lunchtime and if appropriate at the end of the meeting.

Content Suggestions

- A Speaker
Invitations to Speakers should always include clear guidance on length of talk required and also obtain from the Speaker any special requirements they may have. Try also to have a variety in the topics the Speakers cover.
- Discussion
This could be on a current Franciscan topic or Provincial or Area matters
- Activity/Workshop
Occasionally an Area meeting which is creative is very fruitful. Organising a Prayer group, a music group, a craft group etc. to come together in the Eucharist can be very rewarding.

Area Annual Report to your Link Tertiary

Area Teams are required to submit an Annual Report following each Francistide. It is expected that all members of the Area Team will contribute and agree the Annual report.

It is the responsibility of the Area Minister to collate and submit the report to their Link Tertiary. If there is a change of Area Minister then it is the responsibility of the AM who was in charge during the year to complete. This will also apply to the Area Formation Guardian if there is a change in post with regard to Part B.

An annual review benefits both the Area and Chapter. It helps the Area Team learn and plan, and shared with Tertiaries locally it enables everyone to be kept informed. From Chapter's point of view, the report enables us to respond to the needs and opportunities you draw to our attention, so that we serve and support Areas and the Order at large.

Your Link Tertiary will contact you prior to Francistide to remind you of your obligation and also to outline any particular items that either Province or they would like you to comment on.

Province will return the compliment each Spring in an Annual Provincial Report, summarising the overall picture of events and issues throughout the previous year. This will be published in TON.

The Area Annual Report now consists of two Parts

- Part A is the general report and in addition will contain any additional questions your Link Tertiary may ask.
- Part B is the report on formation in the Area. This should be completed by the Area Formation Guardian. This section will be passed on to the Provincial Formation Guardian for information.

Part A

General Reporting on the Area.

The Area's review is an opportunity to:

- evaluate the general picture emerging from local groups, and the Area Team's own work over the past year.
- recognise and give thanks for good things
- identify where there is scope for development
- mention noteworthy initiatives and developments in local groups and Area events
- share good practice and successes which might benefit other groups and Areas
- agree action for the Area Team to take (outlined in Statute 2.5)
- make recommendations or raise issues which Chapter should address.
- Respond to additional questions as requested by your Link Tertiary in their annual guidance and reminder letter to the Area Minister.

Part B

Reporting on Formation

The following Statistics are requested.

- the number of professed who have made their annual report
- The Number of professed who have renewed
- Number of Professed, Novices, Postulants and Enquirers in the Area

- evaluate formation in the Area emerging from the reports from individual Tertiaries.
- Share any formation issues and developments of importance.

The Area Team should meet after Francistide to discuss their review so that the Area minister can complete it in good time

Submission Date

Please let your Link Tertiary have your report by the end of November each year.

Your Link Tertiary uses your contributions to produce a Cluster Summary Report for Chapter.

Provincial Chapter Members

All Provincial Chapter members are elected for a period of three years with an option to continue for a further three years.

Details of all members of Provincial Chapter and other contacts can be found on the TSSF website.

Link Tertiary

Your LT is your primary representative on Chapter and is elected by the Cluster. Your LT should be your primary contact for support and advice on Area Team matters. He/she is expected to attend an Area Team meeting in your Area or come to an Area Day once a year to keep in touch as a minimum.

The job Description for the LT is included in this Handbook, so Areas can be clear as to the responsibilities of their representative on Chapter.

Chapter Officers

- Provincial Novice Guardian
The PNG is also available to be consulted on Novice issues if required.
- Provincial Formation Guardian
The PFG is also available to be consulted on Formation issues if required.
- Provincial Treasurer
The Area Treasurer liaises with the PT as stated in the Financial Guidelines.
- Chapter Lead on Safeguarding
- Chapter Lead on JPIC

Link Tertiary

As a member of the Chapter and a Trustee of the Order, to provide a personal link between Tertiaries in an agreed cluster of Areas and the Provincial Chapter.

Accountability

To the Area Ministers, Minister Provincial and to the Chapter

Conditions of election

- Elected by professed Tertiaries within the Areas represented.
- Elected for six years subject to a review by the office holder and the Chapter after three years in office. After this time he/she cannot hold the same office for at least three years.
- The office should be held by a professed Tertiary who is not at the same time a Provincial office holder, an Area Minister or hold any other post on an Area Team.

Responsibilities

- To act as a member of the Chapter and Trustee of the Order, attending meetings of the Chapter regularly
- To share with the Chapter ideas, examples of good practice and matters of concern from the Areas represented.
- To communicate personally the vision, decisions and proposals of Chapter to the Area Ministers whom he/she represents.
- To refer to the Chapter any proposals for changing the Cluster of Areas which he/she represents.
- To exercise a ministry of encouragement in their Areas and support Area Ministers in their responsibilities to implement the constitution, statutes and formal decisions of the Chapter.
- To attend at least annually an Area Team Meeting or an Area Day in each of his/her Areas.
- When invited to do so, to assist Area Ministers in resolving any difficulty within their Areas.

Section B

Finance Guidance for Area Treasurers

1. Introduction

The job of the Area Treasurer is an important one, but it need not be onerous or complicated. The following notes are to assist you and to understand what you have to do both for the Area and reporting to the Provincial Treasurer.

2. Bank Account

It is expected that Areas will have bank account in the name of: Third Order of St. Francis - name of Area. There should ideally be three signatories of which any two are needed to sign cheques. Banks are increasingly concerned to counter "money laundering" and this means you have to accept the apparent bureaucracy involved in setting up an account or to change the signatories.

It is well worth setting up your bank account to do 'online banking' and to reimburse Tertiaries by BACS payments rather than cheques particularly as these are less and less accepted. The Provincial Treasurer can assist with this if needed.

3. Cash Book records

3.1. Expenditure

Each Treasurer should keep records of what is spent and on what.

3.2. Income

This will come either from Provincial funds or from Tertiary collections at Area Days. A further category will be Area Retreats where you may be asked to collect both deposits and the balance to pay over to the Retreat House.

3.3. Cash Book

A simple columnar cash book makes it easy to put items under the headings which the Provincial Treasurer will want you to report on the financial year which ends on 31st May. A copy of the form and the headings are attached in an Appendix to Area Handbook.

The cash book should be closed at the end of the financial year and the balance carried forward into the next year should agree with the closing balance in your bank account. (See Annual Return example in Section D)

4. Rules on Expenditure

4.1. Area Day Expenses

Costs for room/hall hire will vary from Area to area due to geographical locations. There is likely to be little flexibility in the cost of venues and such costs need to be recognised. Every attempt should be made to keep these as modest as possible. The cost of speakers including travelling costs should be within the guided cost if reclaiming them from Provincial funds. This does not debar Areas from having speaker above this figure. This simply means they will need to 'self-fund' them.

- Proposed Guide £50 maximum

note: This does not include any donations collected for a speaker's charity which should have a Franciscan ethos to conform to TSSF objects. (See 5.2)

4.2. Area Team Expenses

General Area team expenses should be kept as low as possible. This means keeping such items as photocopying to a minimum and emailing wherever possible to cut down on postage costs.

It is also important that Area Team members are reimbursed for travel expenses and other expenses they incur in the course of their roles. This is to ensure that no one is put off being on the Area team because they cannot afford to subsidise the role. Area Team members who wish to donate their expenses back to TSSF may do so.

Note: the current mileage rate that can be claimed is 40p. (at October 2016)

4.3. Pastoral and Support to Tertiaries

In some Areas there is either a formal or informal structure of visiting and providing support to tertiaries in care homes or housebound and those in ill-health and this need is likely to grow. The cost of these visits in travelling costs can be considerable and it is essential that these costs are borne by TSSF and not by individual tertiaries.

4.4. Other Expenditure

4.5. Gifts for retiring officers from Area Funds

This is not appropriate. Bake them a cake instead!

4.6. Photocopying

This is currently a rising expense for Areas due to the decision to supply Areas with Novice Notes in a PDF for local printing as well as printing TON for some Tertiaries.

4.7. Donations to Charities

These cannot be made out of Area funds.

4.8. Claims for Area Expenses to Area Treasurers

Expenses are claimed on an expense form or expenses can be claimed by a suitable email. Required information should be: -

- The Expense
- The Date of Expense
- Reason/purpose of Expense
- Bank Details for payment if reimbursed by BACS.
- The PT can supply standard expense claim forms for use by Area Treasurers

4.9. Personal Claims to the Provincial Treasurer

If it is an event of any kind organised by Province then claims for all expenses must be made direct to the PT. This enables the PT to truly ascertain the cost of such an event and not needlessly draw on Area funds which are for the Area only. These events are budgeted and managed by the Provincial Treasurer and are his responsibility.

Examples are: -

- Cluster Expenses
- Any Event organised by Province such as the Area Treasurers Meeting or other training.
- Convocation Expenses May 2017

Clarity

- If a Tertiary is asked to attend an official meeting i.e. such as the Treasurers meeting, Convocation, or invited to Chapter then it should/and is made clear that expenses are met before the event takes place.
- If there is an official steering group meeting for any of our groups then we currently fund expenses for these meetings.

The Provincial Treasurer does not process the following: -

- If a tertiary wishes to make a retreat and is in need then application should be made to the Knox Dick Fund.
- If a tertiary wishes to attend an event organised by one of our interest groups i.e. JPIC or a optional Provincial event, they do so at their choice and expense.

Note: Email claims are acceptable and payments are always made by BACS

5. Funding and Income

Areas approach funding in many ways. It ranges from fully self- funding to being fully funded from the Province. Some Areas are self-sufficient, and don't apply for Provincial Funds, using surpluses from Area Days to pay their officers' expenses. This means more is available for those Areas which need subsidies. There are many factors which rightly shape these decisions and it is indeed not right that one solution fits all.

The view is that there should be an awareness that where possible Areas should consider what voluntary contributions a Tertiary could make towards Area Days in particular if able.

The system will remain a flexible one with Areas deciding their policy for their Area.

5.1. Tertiary contribution

A tertiary is expected to make a regular commitment, preferably by Standing Order to TSSF if able to do so. These funds go directly to the Province Treasurer. In addition, if eligible, Tertiaries should be encouraged to Gift Aid their contribution.

- Standing Order and Gift Aid forms are available from the Provincial Treasurer.

5.2. Area Day Income

Contributions received directly from Tertiaries at Area Days to meet Area Day expenses should always be counted by two people and recorded. One of those two people can be the Area Treasurer but need not be.

5.3. Charitable Donations on Area Days

received directly from Tertiaries for charitable purposes should also be verified as above. It is important to note that donations may only be collected for recognised Franciscan charities and causes. The objects of our charitable status do not allow us to collect for, or support other causes, however worthy.

5.4. Retreats and Quiet Days

If an Area chooses to run an Area retreat this must be fully funded by the participants. This means that where a deposit is required for the Retreat House then all participants should pay a deposit.

No Advance deposits or balances may be made from Area Funds held in the Area bank account. These funds are for Area expenses only.

Deposits and balances for Retreats received by the Treasurer may be held in the Area Bank account prior to payment to the Retreat House.

The practice of funding deposits from Area Funds and receiving individual deposits at a later date is not acceptable due to the risk that participants could drop out and the Area Funds would be faced with a shortfall in funds designated for Area expenses.

If this is due to unforeseen circumstances, then every effort should be made to fill the vacancy. However, if this is not possible and the Retreat House expects full payment then Province will look at this as a refundable expense.

Note: See Area Retreats Secretary Job Description

5.5. Provincial Funds

These are available to meet the expenses of the Area as needed from the Provincial Treasurer. The funds will be sent directly to the Area bank account, normally the same day as you request.

5.6. It is expected that each Area will provide the PT in late March each year a completed Budget form, so that the PT has a clear perspective of what funds will be needed for Areas during the financial Year. (TSSF financial year is June – May.)

- Budget form available from the Provincial Treasurer

6. **Area Treasurers Annual Return**

The annual return form completed by all Area Treasurers is essential and necessary information for the Provincial Treasurer. It provides audit information of both any monies you raised locally and how you spent your money. This has to be incorporated into our Annual Financial Statements.

This is to be completed in respect of the Financial Year ending on 31st May each year. The PT requires the completed form and a bank statement as soon as possible after the year end.

6.1. Basis of your return

The Province uses the Receipts and Payments basis for our Financial Statements therefore all Areas must follow the same method as the Area funds are incorporated into the Provinces Financial Statements each year.

Receipts and payments

(this is simply recording the monies received and expended during the year. It effectively mirrors your bank account.)

6.2. What goes on your Return

In a word everything. This must include monies raised locally either for Area Days, Retreats, or donations to Franciscan charities and everything you have spent. This is important because you are not covered by our insurance for events unless it is included on the Annual return.

Note: this does not apply to Third Order gatherings in a Tertiary's home

6.3. The following are essential

- 6.3.1. You should show the division in your receipts between Area collections and Provincial grants;
- 6.3.2. and in your payments between Area Team and Area Day expenses, and between travel costs and venue costs.
- 6.3.3. The opening balance has to be exactly the same as the closing balance last year, and the closing balance this year has to be exactly the same as the Area bank statement at 31st May, and the auditors require a copy of this.
- 6.3.4. It should add up! (about 10% of Area returns in 2016 didn't actually add up!) So please check your addition!

6.4. Returning your Annual Return to the Treasurer

This is to be returned as soon as possible after the 31st May.

If possible send your return by email rather than in the post. It is accepted that for some this is not possible.

•Annual Return form is available from the Provincial Treasurer. (example in Section D)

Guidance for the Area Formation Guardian for composing the Annual Personal Tertiary Report

Each year in the run-up to Francistide the Order offers professed Tertiaries a formative cycle of 'review, revision, report and renewal'.

The Area Formation Guardian contacts every Tertiary in the Area to ask them to complete an annual Review. This can be by email or post.

Confidentiality

Some information from responses will need to be exchanged within the Area Team to enable the Area to function as a community; Tertiaries will be more honest if they can trust AFGs to treat sensitive information with discretion.

The Area Team should therefore agree and briefly explain in a covering letter its policy for:

Transparency: how might the Area Team use responses in its guardianship of the Area?

Confidentiality: how can confidential information be given to the AFG personally?

Format of the Annual Report

The Provincial Formation Guardian has provided the 'core text' which must be included in the Annual Report. (See the end of this section for this text.)

- Additional or Expanded Questions

In additional further questions can be added by the Area as they think fit. Suggestions and guidance as to possible questions are given here.

This could include one or two questions about other undertakings of profession which are listed in the appendix below. 'Open' questions are better at stimulating reflection and dialogue than 'closed' (factual or yes/no) questions, provided they are not too intrusive.

- Four 'marks of profession' identified by the worldwide Ministers Provincial
These are set out together with Questions that Areas could use to enquire about the relevant undertaking of profession

1. To celebrate the Community Obedience daily
2. To report annually in writing on their living in accordance with the Principles as expressed in their Personal Rule of Life (4.4.4, Const4.3.c)
 - Is there anything that has been particularly challenging or fruitful for you?
 - Do you see your Franciscan vocation evolving in the coming year?
 - Is there anything that would help you in your formation?
 - In what ways are you responding to the three Aims of the Order?
 - How have you been able to fulfil the three Ways of Service, prayer study and work?
 - Would you like to discuss any points raised in this Report with your Area Formation Guardian?
 - Has anything important made a difference to your Franciscan vocation and journey in the past year?
 - Has any one thing impacted on your life in the last year?

3. To renew the Pledge and Personal Rule annually, following a review (4.4.2, Const4.3.a)
 - In the past year have you reviewed your personal Rule of Life?
 - When and where do you intend to renew your pledge?
 - How do you see your Franciscan vocation evolving in the coming year?

4. To make a financial contribution to Provincial funds (4.4.3)

Further undertakings of profession

5. To keep the Third Order Rule which consists of the Principles, the worldwide Constitution and the Form of Profession which contains the words of their life vow (Const 1.1.c)
6. To keep a Personal Rule of Life (4.4.2, Const4.3.a) which interprets and expresses the Principles, and observe its provisions (including the expectation of an annual retreat)
7. To regularly consult a spiritual director, who her/himself has a spiritual director and accepts the Principles as the basis of direction (Const4.1.a)
 - Have you consulted with your spiritual director this year?
 - Could you please provide his/her name?
 - Would you like some help to find a spiritual director?
8. To contribute to the life of the Order, participating in the Local Group (1.2.1), Area meetings and General Chapter
 - Your local group
 - Have you attended Area Meetings? All/most/some/none
 - Have you attended Local Group Meetings? All/most/some/none
 - Would you like to comment on Area and Local Group meetings?
9. To inform the Convenor or Area Minister of reasons for any absence (4.4.5)
 - Is there anything that has made attending meetings difficult this year?
 - Do you anticipate any difficulties attending in the year ahead?

Further expectations of community life

10. To participate in the election of officers (5.5.1) (including accepting nomination if approached and if possible) (Principles Day 24)
11. To undertake an annual retreat of at least 24 hours, or if not possible two quiet days (Novice formation)
 - Have you made an annual retreat or made alternative arrangements (e.g. quiet days)?
12. To inform the Area Secretary and TSSF Membership Secretary if any contact details have changed.
 - Please provide your address, telephone number and email address
 - Having fulfilled your obligations, do you feel supported in your life by the Third Order?
 - Do you have difficulties in fulfilling any of the undertakings of

- profession?
- Would you like to discuss any points raised in this report with your Area Formation Guardian?

Brokering 'buddies' for the annual review of vocation: A further question you could include

Some Tertiaries would find talking to another Tertiary helpful in doing their review. Please indicate (without commitment) if this might be of interest to you next year:

- | | |
|---|----------|
| I might like to do my own review with another Tertiary | Yes / No |
| I might be able to be a 'listener' for another Tertiary in their review | Yes / No |
| I might like a local group or Area meeting to help us with our review | Yes / No |

When next year's review comes round, a list of those who express possible interest in being a 'listener' will be sent to those seeking another Tertiary's company in their review.

Core Text to be included in the Tertiary Annual Report

The annual report is an opportunity to reflect on our 'living of the Principles as expressed in our personal rule of life' (TSSF Constitutions). You might also reflect on the vow of profession, your experience in the last year, your previous report (if you have it) and the prospects in the year ahead. Pages G2-3 of the Manual ask helpful questions.

Having undertaken a review of your vocation, what would you like to report?

Looking forward, how can the Order help you to fulfil your profession? Is there anything you can offer the Order?

As Tertiaries we fulfil our profession 'in company with' others in our Local Group, Area, and more widely, and undertake to give reasons for any absence from meetings. How full a part have you been able to play in our common life this year?

Have you contributed financially to the Order this year, and reviewed how much?

YES / NO

Either bring this form with you to renewals at the Francistide Area meeting or return it beforehand by post or email.

If you cannot attend the meeting please inform your AFG, saying why you will be absent, and how and when you will renew.

(The Core Text document is held in Report in the Appendix)

Report Guidance for the Tertiary which can be included with the Annual Form

Each year in the run-up to Francistide the Order offers professed Tertiaries a formative cycle of 'review, revision, report and renewal'. AFGs are welcome to send these explanations with the Annual Report form to Tertiaries.

- Review and revision:
The cycle starts with the annual review of vocation. As well as reviewing the Principles and your personal rule, you might reflect on the vow of profession, your experience in the last year, your previous report (if you have it) and the prospects in the year ahead. Pages G2-3 of the Manual ask helpful questions. If you make major revisions to your personal rule, please enclose a copy with your annual report.
- Report:
Making an annual report is one of the four worldwide 'marks of the professed' and a sign of our mutual accountability. The purpose of the Annual Report is to invite Tertiaries to account for their 'living of the Principles as expressed in the personal rule of life' (Constitutions 4.3.c).
- Renewal:
Reports will be both issued and returned in different ways according to the individual and Area practice. Reports can be returned at the Francistide Eucharist, or by email or post. Reports should be individually acknowledged and a response made to any specific issues raised. Those Tertiaries who have not submitted a report will need a reminder.
- Return of Reports:
Reports submitted on paper should be returned to the individual by the AFG if a Tertiary requests it, in order to help them in their next review.
- Confidentiality:
Some information from responses will need to be exchanged within the Area Team to enable the Area to function as a community. Such sensitive information will be treated with absolute discretion by the Area Formation Guardian.

Failure to Complete an Annual Review

Completing an Annual Report is an obligation and most tertiaries do so.

It is of course realised that if a tertiary is in ill health or is not mentally able to complete such a report that this obligation should be gently put aside.

However in some Areas the completion of such a report has not been felt as obligatory. They dismiss the Report as simply more bureaucracy and do appear to see the reason for such a review whereas it is integral to our ongoing growth as individuals and as a community..

This raises real problems for the Area Formation Guardian. AFGs are encouraged to approach Tertiaries in their Area, over Renewals, and completion of Annual Tertiary reports, in whatever appears to be the most pastoral way. For some this can be a personal visit and conversation.

It is important where there are a large number of tertiaries who do not see the need to complete a review that this culture will need to be gradually be changed and the perspective and understanding developed in the Area.

It is vital that the Area Team create a plan of action as they have knowledge of where the problems are. Your Link Tertiary and Provincial Formation Guardian are always available to help in any way they can as requested

It is important to ensure that every Tertiary is faced with the challenge of needing to look at their Rule of Life and making their Annual Renewal a very real act of spiritually enhancing their commitment to the Order.

Absence From Renewal

On our journey of faith, the landscape often changes and we need to rediscover our bearings. The Third Order has always understood that its members can encounter times of disorientation, trial and withdrawal. If that is the situation, then a tertiary can seek a period of Leave of Absence for reflection and discernment, normally up to a year at a time, free of the obligations of profession.

Leave of Absence

'Leave of absence' refers specifically to absence from renewal, and is for Tertiaries who wish to be relieved of the obligations of profession.

Offering Leave of Absence makes clear to the Tertiary the reality of their situation – that they are absent, and have not renewed as they should.

The AFG must investigate the reason for absence in order to determine whether a term of Leave of Absence is required or Release from Vows.

Fulfilment of Obligations

Formal 'leave of absence' is not appropriate for a Tertiary who continues to fulfil the four marks of profession, including renewal, but cannot otherwise attend meetings.

Leave of absence is also unlikely to be appropriate for Tertiaries who are confident of their vocation but in poor health or under pressure from personal or domestic circumstances. In such cases the Area Team can authorise a period of convalescence, or the Tertiary revise their personal rule to reflect their current situation.

A Tertiary seeking exemption only from attendance at meetings need only discuss their absence with their convenor / Area Minister in accordance with Statute 4.4.5.

Agreeing Leave of Absence' The Statutes say:

'A professed member may apply to the Area Team for Leave of Absence, giving reasons for such Leave and the amount of time estimated to meet those reasons. The granting of such leave is the responsibility of the Area Team, subject to ratification by the Chapter' (4.5.1, 2).

The responsibilities of Provincial Chapter are:

'to ratify leave of absence, and any extension thereof, granted to a professed member by the Area Team; in each instance a written statement shall be issued in the name of the Chapter, defining the period of leave and the conditions upon which it is granted, including decisions about the observation of the Personal Rule of Life and provision for Renewal' (3.2.5).

Application Form for Leave of Absence

The form is intended to enable a Tertiary to seek leave in a way which is clear and agreeable to the Tertiary, the Area Team and Chapter, and ensures that the Tertiary seeking leave, and the Area, know what kind of contact they can expect. With the exception of the final signatures and dates, it is best if the Tertiary making the request and the Area Formation Guardian meet together in person to discuss the questions and write in the agreed answers.

Notification to Chapter by the Link Tertiary

At the outset the Area Formation Guardian is recommended to establish from the Link Tertiary when the request can be considered by Chapter. Once the form is completed the Area Formation Guardian must send a copy (or the information contained in it) to the Link Tertiary at least one month before the Chapter meeting at which leave of absence is to be ratified, to ensure it features on the agenda. If it is necessary for leave to take effect before Chapter meets, please make it clear on the form that Chapter is being asked to ratify leave retrospectively.

Ratification by Chapter

Once it is agreed by Chapter, the Link Tertiary should inform the Area Formation Guardian and the Provincial Membership Secretary. The Area Formation Guardian should inform the Tertiary concerned and any other individuals named on the form. At this point a date should be arranged near the end of the period of leave to agree what happens at the end of the leave: the alternatives are to return to playing a full part in the Order by renewing their pledge (with one or a few Tertiaries if pastorally appropriate), seek release from profession, or seek a further period of leave.

Period of Leave of Absence and extension

In order to reduce the risk of losing contact, leave should normally not be agreed for more than twelve months. It should not normally be for longer than three successive years: former Tertiaries may be readmitted direct to profession when the time is right (Statute 4.7).

In the case of a Tertiary who is seeking to extend leave, or other absence from renewal, beyond a third successive year the Area Team should consider release from profession, consult the Tertiary concerned, and report to Chapter their choice between release and a further extension of leave.

If a further period of leave is sought, a new form should be completed. If the Tertiary returns from leave, the Membership Secretary must be informed.

Leave of Absence Form is to be found in the Appendix of the Area Handbook

Failure to Renew

Sustaining our profession in TSSF

At profession, Tertiaries make a vow and a pledge. We vow: 'I give myself to our Lord Jesus Christ, to serve him for the rest of my life in company with my brothers and sisters in the Third Order'. It is this vow that makes TSSF a religious order, as opposed to an interest group. It is not just a personal commitment: it is a mutual one between the Order and the individual.

With our pledge, renewed each year, we promise: 'I undertake by God's grace to keep for one year my Personal Rule of Life'. The pledge gives effect to our vow one year at a time. It then lapses. Because our Profession consists of both a vow and a pledge, our Profession too becomes ineffective if we do not renew.

The TSSF Constitutions (4.3) explain why the pledge is time-limited: 'Annual renewal is required to safeguard against nominal membership, and to give opportunity for the Personal Rule of Life to be revised if needed'. As our lives change over time, we are encouraged to change our personal rule, consulting our spiritual director, and, in the case of major changes, the Area Formation Guardian (Manual G-2). In order to feel able to renew we may need to revise our personal rule of life (or seek agreement to a different pattern of attendance if getting to meetings is a problem) – our Area Formation Guardian is there for us to talk to.

A pledge can be renewed at any Area meeting, or if necessary at a Local Group meeting or with member(s) of the Area Team (Statutes 4.4.2). It is not possible to renew *in absentia*. If someone is unable to get to meetings because of health or infirmity, someone will visit instead – a member of the Area Team will be happy to arrange this.

If a Tertiary has not renewed their pledge for two successive years without good reason, and they have not sought Leave of Absence, then their vow has ceased to have effect – even if they have attended meetings because they have not taken the opportunity to renew.

Consideration as to Action on Failure to Renew

The initial action on the withdrawal, or release, of professed Tertiaries should be taken at Area level, by the Area Team. This is as it should be, because those in the Area are the ones who are in closest touch with the situation. The decision must be ratified, as it is much more than a simple formality, by Provincial Chapter.

Area Teams need, therefore, to make sure that that they consult with their Link Tertiary at an early stage and keep in close touch thereafter. This will avoid conflicting views of judgement when it comes to seeking ratification

Failure to renew in Year 1

Every effort should be made to contact a Tertiary after their first absence from renewal. The Tertiary should be asked to specify a forthcoming local group or Area meeting at which they undertake to renew, and a subsequent check should be made to see that they did renew as promised.

- If a Tertiary has still not renewed, then it is appropriate for the AFG to contact the Tertiary and discuss the reasons for the failure.
- The AFG must use judgement to determine whether the circumstances require a Leave of Absence to be considered or that personal circumstances means that absence is preventing them from renewing.
- The AFG must explore if there is there scope to accommodate their situation by amending their rule of life, give notice of non-attendance for meetings other than renewal.
- If there is still a failure to renew on the part of the Tertiary the Area Team is asked to note that the Tertiary's pledge has lapsed (even if they have attended meetings but not renewed)

Failure to renew in Year 2

If a Tertiary has been absent from renewal for two years or more, their profession has effectively lapsed. Statute 4.6.3 gives AFGs and Area Teams the power to initiate the release from vows of a persistently absent Tertiary. However, the Statutes do not specify the terms for doing so,

After making enquiries of the Tertiary, the Area Team may ask Chapter to release them (under Statutes 4.6.2, 4.6.3 and 4.6.7). If release is approved by Chapter, the Tertiary can claim a further year's grace so that they can renew or seek leave. After that they may always apply for readmission to profession. Therefore, before initiating the procedure to Release the lapsed Tertiary from Vows the following action should be taken first by the Area Team if a Tertiary has failed to renew without good reason by the second anniversary of their last renewal.

- The Tertiary should be invited to meet with an Area officer to explore their situation. There are two scenarios to consider with the lapsed Tertiary: pastoral: are domestic or personal circumstances preventing them from renewing, and should consideration be given to leave of absence if renewal is impossible
- Vocational: are they re-interpreting their faith and identity in ways which might be less compatible with profession in the Order.

Guidance on possible reasons for Withdrawal or Release are found in the section on Reasons for Withdrawal or Release.

Review of Circumstances

Following these discussions and or contact, the Tertiary should be asked to consider if voluntary withdrawal is appropriate. If this is agreed, then the Tertiary should write a letter or email explaining the reasons why they wish to withdraw. This should be sent to the Link Tertiary either directly, or if received by the Area Team passed to the Link Tertiary with the request to action the Withdrawal.

If not, then the Tertiary can again be asked to specify a local group or Area meeting at which they will renew.

Alternatively, if the officer considers it appropriate the Tertiary can be invited to renew privately there and then, although it should be made clear that they will be expected to renew at Francistide in future unless health issues or other valid circumstances apply.

If the Tertiary still does not renew as promised, and has not chosen to request or agree to a Leave of Absence, or Voluntary Withdrawal it is appropriate to begin considering whether they should be Released from Vows.

Area Team action for Release from Vows

The procedure is the same whether this is a voluntary withdrawal or a request from the Area Team for Release from Vows

- The AFG asks for the Area Team's agreement to request Provincial Chapter for approval for release from profession.
- If agreed, the AFG informs the lapsed Tertiary, and contacts their Link Tertiary who will seek Chapter's ratification

Contacting your Link Tertiary

When the Area Team has made a decision to allow or request withdrawal and release, an email should be sent to the Link Tertiary outlining the reasons clearly. Within the limits of confidentiality, this should include copies of all letters written, short accounts of meetings with the person concerned, and any other appropriate detail are essential.

Departure from the Order

It is desirable where possible to make the release to be seemly and dignified. Where the Tertiary wishes, and it is appropriate, it is possible for the Local Group or the Area to make use of the Service of Praying our Farewells in the Manual (2001 Revision.)

After ratification by Provincial Chapter, a letter or email is always sent if possible and appropriate by the Link Tertiary to the person concerned on behalf of the Third Order, wishing them well and promising them our prayers.

Appeals

Finally, even when the decision has been made by the Area Team and ratified by the Provincial Chapter, it is still possible for the Tertiary concerned to appeal. The Tertiary will still have a year's grace (see the Statutes) before the decision is implemented. Should the person concerned *not* wish to be released, he or she should write to the Minister Provincial, who will consult with the Provincial Formation Guardian and set up the Appeal procedure, as described in the Statutes

Review

The Area Team may be asked to conduct a Review of a Release from Vows. This will occur when either the Team or Provincial Chapter are concerned about the circumstances which have caused the Tertiary to request Release from Vows. Your Link Tertiary will either request it or the Area Team will conduct such a review themselves. A report must be sent to your Link Tertiary after the Review is completed.

For Example:

There might need to be a serious question asked about the style or quality of the Novice Training which a particular departing Tertiary has received. This would be particularly true of someone seeking release within only a few years, or even

months of profession!

Or if it appears that a tertiary in personal difficulties or ill health as not received appropriate pastoral support from the Area.

Return of Manual and Professional Cross

Provincial Chapter has requested that every effort should be made for the return of these. However, it is recognised that this is not always feasible and should not be unduly insisted upon.

Reasons for Release from Vows

Fortunately, requests for Release from Vows from the Third Order to Chapter are not very numerous. Please take note of the Statutes, 4.5; 4.6; and 4.7.

Voluntary or Mandatory Release

There is a substantial difference between cases when people are actively *seeking* release, and cases where by their apparent failure to live up to their obligations as Tertiaries, the Area Team begins to feel they should be *asked* to be released. It is a distinction which needs to be born in mind throughout. There are also the cases of tertiaries with whom there is no contact for some years that the Area Team feel should be after careful consideration by formally Released from Vows.

We all need to remember that our vow at Profession was for a life long commitment to the Third Order. To withdraw from it should be seen therefore as a very serious step which should never be taken lightly and require real seriousness and concern.

Reasons for Voluntary Release

When someone asks to be released the Area Team should explore the reasons with great sensitivity and love, being aware of this seriousness, and where appropriate reminding the Tertiary of it.

The reasons behind the request need to be identified and understood, as far as possible. Sometimes they are real and entirely right. Sometimes they stem from a misunderstanding, or from a failure of love on the part of other Tertiaries, which can, when attended to, be rectified and healed. If this is so, the onus is on us to do what we can to put things right.

- As someone's spirituality has deepened they have come to realise that essentially they do not have a calling which is Franciscan so much as e.g. Benedictine and no longer feels at home with the TSSF and are hoping to find another way.
- Someone asks to withdraw because they feel called to explore a vocation to the First, or Second Order.
- Someone has lost his or her belief in God or in the Christian Faith.
- Unable to keep their Rule of Life as they see it.
This can include being less able to get to meetings, or keep their original rule of life, and feel therefore that they should be released,

Mandatory Release

This is invoked by the Area Team when after careful discussion and if possible a meeting with the member concerned it is determined that it would be appropriate for the Tertiary to be Released from Vows.

- No Response to requests to Renew
Where is no response to reminders about the need to review their Rule and renew their vows and refusal to make appropriate arrangements to do so.
- No Contact
Someone has been entirely lost sight of, or not answering letters, or not responding in any way to any approach at all for two years or more.
- Disruptive behaviour
Where a tertiary is disruptive and unhelpful at the meetings they come to,

and other Tertiaries are feeling that it would be better if they were asked to be released.

- Inappropriate lifestyle
Someone is leading an inappropriate life style and causing embarrassment to others, and there is a feeling that they should be asked to to be released
Reference section guidelines on 'lifestyles.'
- Non Attendance at meetings
Where a fit tertiary has not attended any meetings without good reason. (This must be in addition to not renewing their vows. It is not a valid reason on its own.)

The initial action on the release, of professed Tertiaries should be taken at Area level, by the Area Team. This is as it should be, because those in the Area are the ones who are in closest touch with the situation. The decision must be ratified, as it is much more than a simple formality, by Provincial Chapter.

Area Teams need, therefore, to make sure that that they consult with their Link Tertiary at an early stage and keep in close touch thereafter. This will avoid conflicting views of judgement when it comes to seeking ratification.

Re- Admission

Former Tertiaries seeking permission to return.

- Any request to return should of course be looked at sympathetically and lovingly. It does however call for realism.
- If the applicant withdrew while still in the Noviciate, the Area Novice Guardian can decide at what point in the Noviciate formation should be resumed. If, however it was any length of time ago, it is advisable to begin the Noviciate again. In any event the Provincial database Administrator will need to be informed.
- Particularly if the person concerned is a newcomer in the Area, an enquiry to the Administrator can possibly throw light on the original reason for release, which from the Third Order's point of view *may* not in fact be the same as that presented by the applicant! Unless the release was itself less than twelve months ago a Probationary period has to be decided on, which needs to be of not less than six months. During this period the person concerned must be treated as a Novice once again. Provision must be made for them to refresh themselves in a Franciscan Spirituality and also to catch up with such changes as may have occurred during their absence. They need to be allocated a Sponsor for that period, who could well be someone who is already a Novice Guardian. As with Novices, no undertaking should be given regarding their re-acceptance into the Order until that period has been completed.
- As with Postulants, this period of formation begins with the signing and accepting of the Basic Rule, though here the move onto their own Personal Rule of Life will probably be quite speedy.
- The returning former Tertiary must be given a Local Group. It will be the responsibility of the Sponsor to see that this is done. The returning former Tertiary must have a formation meeting with his/her sponsor at least twice during this (minimum) six-month period.
- The Sponsor must see that a Green Data form is obtained from the Area Novice Guardian. The form should be completed at once and sent to the Area Secretary for his /her records and then passing on to the Provincial database Administrator.
When the Sponsor is content that all is well, he/she should report so to the Area Novice Guardian and a decision be made by the Area Team for ratification by Provincial Chapter in the same way as that for Novices.
- Once the ratification has been obtained, the returning Tertiary should be welcomed formally and renew his/her membership as with the Welcome of ReAdmission. (Example in Section D of Area Handbook)

Confidentiality in the Third Order

The Concept of Trust

Implicit in all pastoral relationships in the Third Order is the concept of Trust, which is closely allied to creating, at all times, an atmosphere of caring love which prevents situations from becoming judgmental and legalistic. The Principles underpin this practice of care for each other

When there is a need for Confidentiality

- Clarity on both sides about the extent of confidentiality is important, and whenever confidential information is to be shared with others, it should be with consent. There are exceptional situations, for example, when there is a danger to others or safeguarding, that require sharing with others who 'need to know'. When Provincial or Area officers consider it necessary to disclose information, and consent cannot be gained, it is important that the person should be informed that such disclosure has taken place, or will take place.
- An Application to become a Novice or for Profession implies consent to being named in the required discussion by the Area Team. Pastoral concerns considered by the Area Team may involve life-style issues and religious beliefs. Similarly, such issues may be discussed regarding people seeking release from, or being asked to leave, the Order. In matters of stated confidential information where names are included then the individual should be named only with his or her permission.
- There is an important exception to the necessity to gain consent before disclosing information. If there appears to be any risk of harm to other people, or to the person involved, it may be necessary to proceed without consent, but the person concerned must be informed that disclosure has been, or will be, made.
- A person's dealings with a Spiritual Director are absolutely confidential. The Spiritual Director may only give information to the Third Order with the consent of the person who has confided in him/her. The relationship between Novice Guardian and Postulant/Novice cannot be entirely confidential because of the need to report to the Area Novice Guardian. However, it should be made clear early in the process that matters which throw some doubt on the person's suitability, perhaps for the time being only, may have to be referred to the Area Team. The Area Team may need to discuss personal matters concerning individual Tertiaries, for example matters of lifestyle, attitudes, beliefs, transient problems etc. which may arise from the Tertiary's progress from Novicing to Profession, or if there is a question of release from vows.

Building an atmosphere of Trust

- In agreement with those concerned, it is important to restrict the number of those who are party to confidential information. Determine first the nature of the confidential group – Provincial Chapter, members of Chapter appointed by the Minister Provincial or his/her deputy, the Area Team or members of the Team appointed by the Area Minister. The Local Group convenor may need to discuss a pastoral issue with other group members, but the same issues of confidentiality apply.
- Where a confidential case is discussed with others outside the designated Chapter or Team members, all names or identifying data should be removed or disguised.
- It is the responsibility of the Minister Provincial, and at Area level, the Area Minister, to decide who should share what information.
- Information given in confidence should not be shared with anyone other than designated Team or Chapter members, unless absolutely necessary. Where agreement to share is given, it is very important that those who receive such information clearly understand the requirements of confidentiality.
- Whenever a Tertiary shares private personal information with the Local Group, that information is confidential unless specific permission to pass it on is asked for and received. Such trust is vital to nurturing the local group community life.
- Make all Tertiaries aware that discussions and decisions about individuals may have to be made confidentially and that not everything to do with a group can be decided by general discussion.
- Take extreme care when mentioning an individual for prayer. Even when a situation is disguised in an effort to make it anonymous, there may still be a risk of recognition and identification. Care should also be taken about who is present when playing back answering machine messages. It may be better to use the postal system rather than email when discussing confidential information.
- Minimum written records should be kept at Area level so that Provincial Chapter may be fully informed should an appeal be made. Records so kept must be secure, clear and open to the person to whom they refer. Those compiling the records should be prepared to be accountable for their contents.

(Be aware of Data Protection legislation, but if in doubt check with the Provincial database Administrator)

Lifestyles and Third Order Discipline

From time to time concern arises within the Third Order over the lifestyle of one or more of our members.

'Discipline' shares its root as a word with 'Discipleship'. This section concerns itself with how we as an Area Team, might sometimes have to look, pastorally, at the 'discipleship' of our brothers or sisters.

- Novices
This can occur when the questions arise over whether or not a particular novice should be approved for Profession.
- Tertiaries
The concern may be that a Tertiary appears to other members of his/her Local Group, or to the Area Team, to be living in a way not morally compatible with Third Order Commitment.

Area Team Responsibilities and Perspectives

Principles to guide our actions

It is not possible to be precise and specific on every issue, but there are some principles which we all should bear in mind.

- It is the responsibility of the Area Team to consider and decide on action over such pastoral issues. It may be, however, that you will feel the need to consult with your Link Tertiary, or with the Provincial Formation Guardian, on what might be the appropriate action to take. This will be particularly true if you decide that someone should be asked to withdraw from the Third Order, as any such decision would need to be ratified by Provincial Chapter.

Seldom does anyone criticise any other Tertiary's life style with regard to the vows of Poverty/Simplicity and Obedience. Rightly we consider the living out of others' Rule of Life in these two areas to be a personal and private matter, decided only between themselves, their Spiritual Director and God.

- The Third Order does not have the right to make up its own rules about moral behaviour. We are at root a part of the Anglican Communion, in the various Provinces of the United Kingdom, and must always seek to be loyal to that. So, for example, in the area of homo-sexuality, where our Church allows a far greater freedom than some individual Anglicans might believe to be right*, we have to be true to the spirit of our Church even though we ourselves might find this difficult.
- In the case of marriage breakups the order can be aware of the fact that there are moral standards, which need to be upheld with vigour and conviction. In some instances, other people are very badly hurt by selfish behaviour. A deserted spouse may rightly be very angry. Children may be the victims.

There is not infrequently local scandal to be borne in mind as well. The tertiary's own church could be in the thick of this, but the Franciscan local group or area may be also, and so the Area Team needs to be aware of and

* *Issues in Human Sexuality*, Church of England House of Bishops, December 1991

considerate over them too

- Rumour can be a poor guide. Part of our caution must be that we need to make sure, as far as we can, that what we hear about someone is in fact the truth.
- Which, all in all, explains why decisions in such matters are so difficult.

Area Team Action and judgement

- We need to make absolutely certain that we begin and continue in the Spirit of Christ. The first and the greatest thing we need to do is to pray for the 'offender' and for guidance on what needs to be done before we can seriously address the issue.
- We need to hang onto the guiding principle of Love: love for our brother/sister the Tertiary concerned; love for those who are hurt by his/her action; and remembering the Love of God in Christ, who reaches out to us all, encompassing us all and embracing even this situation.
- We need to have the courage to go beyond other people's reports and see whether a suitable person can discuss with the person concerned and explain the dilemma into which their action puts TSSF. They do not by any means always see this until it can be explained to them.
- It is not necessarily our business to try to persuade such people to amend their way of life. This is especially true for those who genuinely believe, (however erroneously, we might think) that what they are doing is the will of God. Others will be pointing out to them the effect they are having on for example their families and their church. It is our business to point out to them the effect they are having on their fellow Tertiaries.
- We need to remember that we are an order of Penitents, recognising our own failures and the existence of the beams in our own eyes, while bound to give attention to the speck in another's. We stand alongside them, not over and above them. Judgement is, as Our Lord tells us, his business, not ours.
- Christ is a God of forgiveness, and penitence and a turning away from folly is always possible. So too is coming to terms with and ultimately settling down to the realities of a new situation, in which He is still present.
- Sometimes of course, penitence has already come and any offence is in the past. Here, if for example someone has been in prison and is beginning life again, their past should never be a reason for excluding them from our membership.
- Sometimes, having worked through an issue, we need to do nothing. Sometimes we need to explain to other Tertiaries that they should be more accepting and live out their *own* discipleship better.
- However, troubled we might be over someone's behaviour, we should give ourselves, and them, as much space as we can. It is of course possible that they should be asked to leave the Order. (Procedures are outlined in the Release guidelines) It is however also possible to suggest that they withdraw from an active Third Order life for a period of time, not attending TO Meetings, but still living by their Rule of Life. During that space, matters are likely to become far clearer.
- There should then be a specified period of time after which the matter is reconsidered. During it however it is essential if at all possible that someone from the Team should keep in touch with the person concerned.

Tertiaries Absent from Local Meetings, and Area Meetings

There is a distinction between absence from meetings and absence from annual renewal. Attendance is only an absolute requirement for the purpose of the annual Renewal (although even then if necessary the Tertiary can make alternative arrangements), because renewal ensures the Tertiary continues in full profession.

There are valid circumstances which can prevent a tertiary from attending meetings. Some guidance will be found in the pastoral guidance. Statute 1.2.3 recognises that age, ill-health, family or work commitments or a vocation to solitary life can excuse a Tertiary from attending meetings. Statute 4.4.5 requires a Tertiary to give reasons for their absence to the relevant office holder.

If a Tertiary expects to be absent from either Area or Local Group meetings for an extended period of up to a year, they can inform the relevant Area officer beforehand or afterwards. The officer can accept prior notification of non-attendance for an extended period, say up to a year at a time.

When a Tertiary gives prior notice of a period of non-attendance it should be reported to the Area Team, and recorded so as to ensure that the Tertiary is welcomed back after the period of non-attendance.

Tertiaries should attend Area and Local Group meetings when truly and honestly possible.

In the event of absence

- There must be a willingness to be visited, telephoned, receive TON, pray for the Local Group and 'belong' in all possible ways.
- A tertiary is still expected to fulfil the four 'marks of the professed' recognised by TSSF worldwide (namely an annual renewal, report and financial contribution, and regular celebration of community obedience).
- Attendance at the one Area Meeting, for Renewals, at Francistide is essential.
- Or if even attendance at Renewal is not possible, a willingness to allow alternative arrangements to be made for the benefit of the community is necessary.
- And when circumstances change, a willingness to become more active again.

Improving Attendance

With the added emphasis in recent years in the Third Order on the need to belong not only to the Area but also to a Local Group within it, it is important that a review of meeting times and locations should at times take place to hopefully find ways to facilitate greater attendance at meetings.

Persistent Absence

Where a Tertiary is persistently absent without good reason, and has reached the point where they appear to have withdrawn from the Order. Then please refer to the guidance on both Leave of Absence and Release from Vows.

Safeguarding Guidance for Areas

Franciscan Safeguarding

Our life together, locally and internationally, is pledged to *“spread a spirit of love and harmony among all people”* making community and communion visible and so to *“reflect that openness to all which was characteristic of Jesus”* *

Trust and vulnerability are precious foundations of this radical vision of life in Christ.

When such trust is broken and abused the violation and damage is immense. The language of ‘safeguarding’ is now common following public cases of sexual and other abuse in Church and institutions. Franciscans, perhaps more than many others, are committed to safeguarding because of the vision of human community as the Body of Christ.

The Third Order, as a religious community and as a registered charity, is working to safeguard these precious community foundations. The fact that there have been Tertiary offenders convicted of abuse is witness to our vulnerability.

Statement of Policy for TSSF

This can be found on the TSSF website under the Chapter Handbook section. This statement of policy and practice explains the steps that need to be followed if ever there are matters of concern to share. Areas are strongly recommended to download this Statement to understand the procedures that TSSF has in place in order that they can follow these correctly.

Safeguarding Representative

Each Area must appoint an Area Safeguarding Representative. The Provincial Safeguarding team will be providing preparation and training for those in post and must be informed when an Area Safeguarding Representative is appointed. The Job Description for the Representative can be found in Part A of this Handbook under Area Officer Roles.

In the absence of such an appointment the Area Minister is responsible for Safeguarding.

TSSF Provincial Safeguarding Team

This is composed of a TSSF Safeguarding Officer as well as a Chapter Lead member. In addition, we have an agreement with Chelmsford Diocese for advice and support.

Contacts

The names and contact details of current post holders are published in both TON and Little Portion. In addition you can refer to:-

TSSF Website: tssf.org.uk - 'safeguarding' and further contact details.

Email: safe@tssf.org.uk

Area Safeguarding Issues

If you have any safeguarding issues then either the Safeguarding Representative or if there is no ASR then the Area Minister should inform the TSSF Safeguarding Officer immediately.

The Provincial team is there to assist in any way. Please do not hesitate to get in touch whenever there are questions.

*See Day Eight, The Principles

Pastoral Issues for Area Teams

Our Order has an increasing number of Tertiaries who are no longer able to take a full part in active community life. Each Area has developed its own way of dealing with the care and nurture of such individuals. There will never be 'a one size fits all' as geography, resources and the number of tertiaries all play a part.

Whatever the solution the TSSF Safeguarding policy must be taken into account through your Area Safeguarding Representative.

Keeping in touch with the Lone Tertiary

It is essential that Area Team has, or does develop a strategy to cope with this need in their own Area. This could range from Local Convenors taking responsibility in their group, to personal 'buddies', or organising an Area wide pastoral scheme. We should be doing all we can to express our fellowship and continuing care.

The issues of failing physical and mental health will challenge both the pastoral visitor and the tertiary themselves. It is paramount that the tertiary still feels included in community life.

Area and Local Group members are usually already closely monitoring and maintaining contact with 'Alone' Tertiaries to prevent them being marginalised and undervalued. Contacts, in order of importance might be visits, (which play a major role and are sometime the only way), telephone chats, and maybe e-mail.

Establishing, operating and maintaining links with a Lone Tertiary

It is stressed that the following is an example, and not a requirement of the Area Team. The strategy as is stated above is to be set by the Area Team.

Delegated responsibility to enable well-structured and organised communication to be established and maintained with lone Tertiaries.

- The Area Team allocates/decides/endorsees which Local Group will keep in touch with the isolated Tertiary. (Alternatively, the isolated Tertiary may request contact through a specified Local Group.)
- The Local Group will identify a contact person who will establish a person-to-person link with the Lone Tertiary.
- The Local Group Convenor discusses these arrangements with the Isolated Tertiary.
- Direct one-to-one communication is established between the contact person and the Isolated Tertiary
- The Lone Tertiary establishes links with his/her officer.
- The contact person reports back to Local Group, bearing in mind the guidelines on 'Confidentiality'.

The above establishes a formal arrangement to ensure that the Lone Tertiary is always in contact with at least one other Tertiary who reports to and from the Local Group. It does not rule out any informal linkages.

The costs of maintaining the 'contact person' – Lone Tertiary link to be borne by the Area

Challenges for the Tertiary

These lone Tertiaries have often been Tertiaries for decades, so they have known and experienced TO group meetings and experienced TO fellowship in the past. They are now less able to get to Local Group meetings, or keep to their earlier Personal Rule of Life. Some lone Tertiaries may be entirely housebound, while others may be in residential homes, care homes, or hospitals. They will often miss the fellowship of their LG meetings.

It also has to be recognised that some will have lost cognitive functions and as such find life difficult. Whatever their mental state they are and should always be part of our Franciscan community.

Keeping the Rule

This must be interpreted as widely and flexible as possible. Tertiaries must be encouraged to modify their rule to suit their particular circumstances and not feel that they have to leave the order because they can no longer keep a full Rule or get to meetings.

Those who are ill often find it very difficult to pray at all and need to be helped to limit themselves to what is possible, not feel guilty because they can do so little, and rely more on the prayers of others.

An approach to a Rule of Life for an older Tertiary or a Tertiary with health issues

Some suggestions on modifying a Rule are set out below.

- Attend the Eucharist on Sunday, if the Service is at a sensible time, and not too long. Alternatively a Weekday Eucharist might be possible. When necessary, though, ask your parish priest to make sure that Communion is brought to you regularly at home.
- Penitence - a short act in private prayer would be good. If you feel the need, ask your parish priest to call.
- Prayer needs to be reduced. Several short periods may be better than attempting one long one (which leads to guilt about nodding off, etc!)
- Self-denial perhaps calls simply for the power to rejoice, to deny oneself the luxury of self-pity.
- Retreat - Possibly a quiet day at home, or a given half hour a week - just for a bit of silence and attention on God.
- Study may be jettisoned altogether. Although if reading is no problem a look at the Church Press can help, and some TV programmes, if well chosen, can be very informative.
- Simplicity - If in control of personal money a simple rule on the level of giving will suffice. If not, try to adopt a cheerful acceptance of the new simplicities of life.
- Work - Something like 'I will cheerfully co-operate with those who are working round me'.
- Obedience 'I will go with the Spirit.'
- But for or the housebound and the bedridden there are often only two essentials:
- To be thankful to God every day, and to receive Communion when someone brings it.

Further guidance and information can be found in the Assisi Booklet on Ageing. (This is currently in production June 2017)

Disabilities

As Tertiaries, we are naturally a dispersed community, and so making sure everybody is fully included is a calling for every tertiary. Most thought and care about facilitating access at local groups and area meetings, means thought and care by each one of us.

Meetings

Most groups, are by now, I am sure are skilled at the basic needs for arranging a meeting, but it's good to refresh our memories occasionally.

Venue check list

- What is the access into the venue like and is there disabled parking?
- What is the access within the venue like, are the doors wide enough and no steps?
- What is the access to the toilets like, wheelchairs do not levitate!
- Is there heating and is it a warm or cold place?
- Is there a loop system?
- Do you need to provide a BSL signer?
- What is the lighting like? Is there varied seating, at least some chairs with arms!
- Will anyone require large print if printed sheets are to be used?
- If refreshments are served, are you aware of special dietary needs?
- The Eucharist
Can everyone access the distribution of in a way that is comfortable for them?
Take into consideration that some cannot stand or kneel, some cannot hold the chalice safely, so do not like it in the round, as they cannot pass the chalice on etc.
and do you have Gluten free wafers available?

Communication - Arranging a Meeting

When letters are sent out about a special meeting, information should include about access, parking etc and a reply slip included asking about any other special needs so that you can be pro-active in meeting those needs.

Hidden Disabilities

There are also other more subtle and hidden needs that should be considered by your groups.

- Reading material
Dyslexia is a common condition, and there are also non-readers for many other reasons.
Is your material always written? Can it be illustrated with sound, pictures, or supported with discreetly spoken word.
- Hidden medical conditions are also frequent.
- Do you have a quiet area where a nebuliser can be used, or an Insulin injection taken without embarrassment?

All of the above is really just having a good knowledge of the members of your area, knowing what they normally attend, listening, and being attentive to their comfort.

Area Disability Advisers

Durham and Cambridge areas have appointed local disability advisers, who act as first port of call for these arrangements for meetings. This works really well, and other areas might like to follow suit.

Some areas prefer to keep things informal, but have people with skills to draw on.

Why not try and identify people in your area who such knowledge, so that the Area Teams know where to go for local information?

Provincial Disability Advice

Disabilities can be many and varied, from poor sight, loss of hearing, to being confined to a wheelchair and other medical problems.

Margaret Armstrong is our Disability Advisor and has a number of expert volunteers who can give advice on particular disabilities including:

- dyslexia and non-reader issues
- mental health issues.
- Audio CD and large print copies of various publication are available.

Contact: Margaret Armstrong for advice

Email: disabilityadvisor@tssf.org.uk

Further details are also available on the back of both Little Portion and TON.

The Local Group

Groups meet in different venues, in member's homes and occasionally in a church hall or room. Times and frequency of meetings will also vary. It is important that such arrangement meet the requirements of the Group.

Programme for Meetings

The Local Group should endeavour to have a varied programme

Franciscan topics

Little Portion or other books of religious interest

Quiet days, or an occasional mediation

An occasional speaker

Some social time together – possibly a shared meal or a walk

Items for discussion from wither Provincial Chapter or the Area

Occasionally meet and share with another Local Group

Worship

Worship, either a Eucharist or the Third Order Office or alternative forms from time to time as suitable

Agenda

This will include

Business notices

News of members of the Group who are absent

Any item a member wishes to share or ask for prayers

Time for Refreshments and social exchange

The topic for the meeting

Contribution

Members should share the tasks of the meeting according to their skills and physical abilities.

Section C

Distinctive Vocations

Solitary, Single Consecrated and eremitical life, and membership of other communities

Each Tertiary has their own unique vocation within the whole. We all share a responsibility to help each other to discern their own journey and live it to the full, as does the spiritual director. TSSF Networks and Initiatives serve to nurture the diverse and distinctive vocations of individual Tertiaries.

In recent years a handful of Tertiaries have taken a vow of celibacy in the 'Single Consecrated Life'. SCL is compatible with profession in TSSF. More detailed guidance is available below. A number of Tertiaries also identify themselves as 'solitaries', as described in more detail here, and it is possible that some may sense a vocation as a hermit.

Solitaries

Solitary life within the Order is considered in section H-1 of the Manual. If a Tertiary expresses a wish to be identified as a solitary it is important to proceed with openness, gentleness and spiritual discernment. Careful enquiry can be necessary to tease out a mixture of motives.

A call to solitary life does not necessarily mean that the Tertiary will stop attending meetings. Some solitaries value engagement in the life of TSSF as a source of spiritual strength. However Statute 1.2.3 identifies a call to solitary life as a legitimate reason for withdrawal from Third Order meetings, provided the Tertiary accounts for their absence at least once a year.

A Tertiary experiencing an authentic call to solitary life is likely to be questioning their engagement in other areas of life. They may, for instance, wish to reduce working hours, move house to a more suitable location, or withdraw from social commitments, as well, perhaps, as withdrawing from TSSF meetings.

If they wish to have a solitary vocation recognised by the Order they should:

1. Have shared their intention with their Spiritual Director, Local Group Convenor and Area Formation Guardian, including their anticipated level of attendance at meetings
2. Draw up a new rule of life mentioning how many meetings will be attended
3. If seeking to withdraw from meetings, confirm which Local Group they belong to and be able to explain how the Group understands their decision.

Determining a validity of Solitary Status

Requests for 'solitary' status can sometimes disguise other pastoral issues. Sometimes Tertiaries are unwilling or unable to attend meetings because of practical or health difficulties, pressures at home or work, or an unwillingness to engage fully in the expectations of membership. If these are the dominant reasons for withdrawing from meetings it may be inappropriate to recognise a vocation to solitary life. Please refer to the Pastoral section in the Area Team Handbook.

A solitary vocation can emerge as a positive response to forced isolation.

Some Tertiaries simply become absentees without explanation – refer to Part B – Absence from Meetings and section 4.6 of the Statutes for advice in such cases.

Professed Tertiaries and the eremitical life

Someone who is a well-established member of the Third Order might feel a vocation to life as a hermit and yet would like to remain in the Order. When this has occurred in the First Order, the person concerned has entered upon a period of discernment followed by a period of probation before the solitary state is accepted as permanent. Accepted solitaries have remained very much a part of the community because they have been kept in touch with it through prayer, intercession, correspondence and visits and have supported it profoundly through their interest, their prayers, and intercessions.

For a Tertiary, the guidance of their Spiritual Director would be of paramount importance. However, the Area Team, and the AFG in particular, would need to be sympathetically involved in helping the Tertiary find a way to continue to honour their Third Order commitment. At this stage, the Tertiary should not be considering 'Release from Vows'. Rather, the need is for a way of life to be worked out by the Spiritual Director, the Tertiary and the Area Team for a trial period. The arrangement reached would need to be presented for the approval of the Provincial Formation Guardian and communicated to the Local Group for the support of their prayers. Arrangements should include some method of non-intrusive but two-way communication. Only if the trial period reveals that combining the two vocations is not possible should the Tertiary consider a 'Release from Vows.'

Single Consecrated Life in the Third Order of the Society of St Francis

A number of Tertiaries have made profession in the Single Consecrated Life (SCL). SCL is rooted in the Church's most ancient expressions of religious life. It is distinct from solitary, contemplative and eremitical life in that the individual may follow an active or mixed life. Like marriage (another vowed expression of chastity) it is open to members of TSSF, and to be valued and cherished as an expression of our common vocation.

The vow of consecrated celibacy is a personal vow to a bishop (usually the diocesan bishop, but possibly also the Bishop Protector in the case of Tertiaries). After profession the bishop or the bishop's delegate, as 'guardian of the vow', will normally meet with the vowed person at least annually. Those in SCL should register their consecration with the Advisory Council on the Relations of Bishops and Religious Communities. The Advisory Council recognises an 'acknowledged network' also called 'Single Consecrated Life' which those who have taken a vow of SCL are encouraged to join.

Like any candidate, a Tertiary will test a call to SCL with their spiritual director, the bishop and perhaps others. It is helpful if the Tertiary consults the AFG an early stage, and shares something of their discernment journey with their local group. The initial period of discernment is usually followed by a first vow for 3 years. Because the vocations of TSSF and SCL are distinct (but compatible) it might be unhelpful for a TSSF novice, postulant or aspirant to be simultaneously pursuing a call to SCL or in a temporary vow of SCL. On retiring from office the AFG should inform their successor of any Tertiaries discerning a call to SCL.

The SCL Network requires that its members express their commitment to celibacy as a statement in a Rule of Life. Since a Tertiary's rule of life is an element of their profession in TSSF, profession in SCL would normally entail an extension to the usual nine-point individual Rule of Life. As in the case of any substantial change to an individual's Rule, the Area Formation Guardian should be informed of this additional provision.

When the time of profession in SCL comes it would be appropriate for the Order at Area and/or local level to be represented, and for the Tertiary's revised rule of life to be offered on the altar.

Membership of other communities

It has occasionally become apparent, either at the Enquirer stage or well after profession, that a Tertiary has entered, or is contemplating, membership of another religious community while still pursuing a vocation with TSSF. The situation can cause confusion with other Tertiaries, and raise questions of loyalty.

As a general rule a Tertiary may not be a member of another religious Order at the same time as being a member of the Third Order, particularly if it requires undertaking two vows of profession and rules of life.

However there are a growing number of religious communities (as opposed to Orders) with various models of membership and affiliation. Some of these are compatible with membership of TSSF, and indeed a Tertiary may legitimately find dual affiliation helps them be a 'better Franciscan'. In other cases there may be conflicts of commitment. The only way to establish compatibility is to enquire gently of the following:

- What is undertaken in the vow of profession and rule of life – are they complementary, and are there any possible areas of conflict? How are these reconciled?
- Is the Tertiary able to participate fully in the wider undertakings of profession (listed under Guidance for Annual Reports), such as Community Obedience, TSSF meetings, and renewal at Francistide?
- How does the Tertiary understand the relationship between the other community's spirituality and the TSSF Principles and Franciscan way?

When the need arises, these questions should be asked of the Tertiary, since s/he is likely to have worked hard to reach a resolution. It is also likely to be helpful to undertake your own research, for instance on the internet. Answering these questions, and establishing the implications for the Tertiary's future vocation within TSSF, may require a high degree of discernment and sensitivity. Please contact the Provincial Formation Guardian if in any doubt.

Contacts and resources

TSSF Networks: see TSSF website for current contact details.

Email :

Fellowship of Solitaries: www.solitaries.org.uk. Email: fellowshipofsolitaries@gmail.com

Authoritative guidance on SCL is published in A Handbook of Religious Life (Advisory Council on the Relations of Bishops and Religious Communities (2004), Fifth Edition, Norwich: Canterbury Press, pp. 87-93). Tertiaries and

AFGs can also contact the Network for Single Consecrated Life (<http://singleconsecratedlife-anglican.org.uk>) to seek advice from a Tertiary nominated by the network to give such advice.

['Franciscan Solitude'. A Cirino and J Raischl \(editors\). Franciscan Institute, St Bonaventure University, New York , 1995. ISBN 1-57659-006-2.](#)

Sole Expatriate Tertiaries

1. Expatriate Tertiaries - a Definition

- permanently resident abroad

Expatriates residing in Europe can choose to link with an appropriate Area in the UK and in addition there is an informal Europe wide group which meets in Brussels about twice a year.

This group is defined as an independent Area, but is linked and supported by a UK Area (London East and Essex South)

- working and living in Europe on long-term contracts
Guided as above

- Working abroad on short-term assignments - 'itinerant' Tertiaries - moving from country to country.

Expats with no firm base should link with an appropriate Area in the UK and in addition try to stay in touch with a local group.

- Working permanently abroad or on long term contracts outside of Europe
It is recommended that they get in touch with their local Province and join with them. If this is not possible for language or distance, then a link to a UK Area maybe possible.

2. Keeping in Touch - Communication

Area and Local Group members are usually already maintaining contact with Expats via letter, phone, and visits. However E-mail has become the normal method of contact for communication between Tertiaries, wherever they are. However, there are some constraints, especially when using e-mail to communicate with expatriate Tertiaries in some countries.

Skype also has brought face to face conversations into the mix. Indeed, some Local Groups share their meetings with their expats in this way.

2.1. Security

This is not usually an issue in democratic countries. However, extreme care is required when communicating with Expats in countries with restrictive and oppressive regimes, especially those which are hostile to Christians. Constant awareness and vigilance are needed.

2.1.1. Some countries monitor mail and e-mail messages. Therefore, be careful with messages, especially to 'tent-makers', those active Christians like St Paul who work in professional jobs in countries where evangelising is 'forbidden', where correspondence may be intercepted and/or read by others. There is a constant danger of 'blowing their cover'.

2.1.2. Be discreet when sending mail/e-mails to Expats, sometimes even cryptic, when corresponding. Avoid mentioning anything that may be construed (by the 'authorities') as being contentious, inflammatory, inciting, and proselytising

- 2.1.3. Avoid using names and addresses of other people in similar work, and in the same country.
 - 2.1.4. Do not disclose your whereabouts. Only a name and e-mail address is required for the web.
 - 2.1.5. Do not send e-mails that list all group e-mail addresses at the top which will give access to others, who may use them for entirely different purposes. When sending on copies, protect member's privacy, by using BCC (blind copy) which sends a copy of the e-mail, but hides the screen name and e-mail address of others.
 - 2.1.6. Security is more liable to be compromised when using a local ISP.
- 2.2. Legal
- We have to be careful as to how we pass on names, addresses and co-ordinates of individuals. Have we received their approval? How do we deal with Expats who do not wish to be contacted?

3. Keeping in Touch – Publications, Formation and Novicing

There are numerous formal and informal reasons for keeping in touch.

3.1. Publications

At present TON is distributed as a PDF and Area Newsletters usually in a 'Word' document or PDF whilst Little Portion is posted to individual tertiaries. It is expected that due to the high cost of postage that Expats and European Areas will receive Little Portion by PDF in future.

3.2. Formation

Expats who are linked to a UK Area must submit their Annual Tertiary reports to the AFG in that Area. They must also arrange their annual renewal of vows. As we are an Order, renewing 'in absence' should only be considered as a very last resort. For those who are isolated from active Franciscan fellowship for long periods it would be possible, for a local priest with whom the Tertiary has a supportive and known connection to conduct the renewal on the Order's behalf. The alternative would be a renewal on the telephone, by the Expat's home Area Formation Guardian.

3.3. Novicing

Expats will be assigned by the PNG to a link with a suitable UK Area who will appoint a Novice guardian. The Novice will be expect to return quarterly reports and stay in good communication with their NG. Profession will normally take place on a convenient occasion when they are the UK Area.

3.4. Informal communication

It is important to keep in touch with fellow Tertiaries, and the Local Group and Area in order to help them to feel part of the family and experience fellowship, and to avoid isolation and marginalisation and be part of a prayer chain and empathy list

3.5. Location

Expats should be kept informed about the whereabouts of other Expats, to enable them to access local Tertiaries, maybe in other Provinces, where they might be working.

4. Financial Contribution

The transfer of funds for a Tertiary's annual contribution can sometimes present difficulties. Expat Tertiaries should be advised to make contact with the Provincial Treasurer to discuss best ways and means.

Section D

Tertiary Annual Review Report

Core text to be included in Annual Report forms

The annual report is an opportunity to reflect on our 'living of the Principles as expressed in our personal rule of life' (TSSF Constitutions). You might also reflect on the vow of profession, your experience in the last year, your previous report (if you have it) and the prospects in the year ahead. Pages G2-3 of the Manual ask helpful questions.

Having undertaken a review of your vocation, what would you like to report?

Looking forward, how can the Order help you to fulfil your profession? Is there anything you can offer the Order?

As Tertiaries we fulfil our profession 'in company with' others in our Local Group, Area, and more widely, and undertake to give reasons for any absence from meetings. How full a part have you been able to play in our common life this year?

Have you contributed financially to the Order this year, and reviewed how much? YES / NO

Either bring this form with you to renewals at the Francistide Area meeting or return it beforehand by post or email.

If you cannot attend the meeting please inform your AFG, saying why you will be absent, and how and when you will renew.

Request for leave of absence

Name of Tertiary:

Name of Area:

Date from:

Date to:

Tertiary's reasons for request (in brief):

Record below the agreed conditions for the period of leave. In particular, will the Tertiary continue to fulfil the Rule (particularly as regards their personal rule of life, annual report and renewal, and attendance at meetings if helpful), or will these be varied in some way or suspended?

Contact during leave. The Area Formation Guardian will be in contact when necessary with the Tertiary during their absence. For additional support the Area team may name a fellow Tertiary (or Tertiaries) to be a point of contact, for purposes of practical communication, pastoral support and seeking a way forward.

Name of additional contact(s):

Postal mailings and group emails will continue to be sent unless otherwise agreed and noted here.

Date of approval by Area team:

Signed and dated by:

Tertiary making request:

Additional contact(s):

Area Formation Guardian:

Date of ratification of Leave of Absence by Chapter:

The Link Tertiary must inform the Area Formation Guardian and Provincial Membership Secretary of the name and duration of leave

Date of final review by Tertiary and Area Formation Guardian:

Outcome of review: .

ORDER OF SERVICE FOR THE RE-ADMISSION OF FORMER TERTIARIES INTO THE THIRD ORDER, THE SOCIETY OF SAINT FRANCIS.

This Service may take place at an Area Meeting, at a meeting of a Local Group.

It may also take place, exceptionally, when considered appropriate by the Area Team,

in a small representative gathering at any time and place.

The Officiant may be the Area Minister, or the Local Group Convenor, or whoever else is appointed by the Area Team

Officiant My brothers and sisters, Franciscans seek always to be conformed to the

image of our Lord Jesus Christ after the example of St Francis. Living in the world members of the Third Order seek, like him, to make humility, love and joy the pre-eminent notes of their lives. We set before ourselves the three aims of the Society; to spread the knowledge and love of Christ, to promote the way of love and unity with all creation, and to live joyfully a life of simplicity and humble service.

As our Lord Jesus Christ humbled himself to share our human life, so may we leave self behind, that with him we may be raised by the Glory of God the Father.

(SILENCE)

In this spirit will N... who wishes to be re-admitted into our Order please come forward.

Sponsor I present to you and to our sisters and brothers N... who wishes to be re-admitted into the Order.

Officiant Do you accept the Principles as the vision of community for the Third Order of the Society of St Francis?

Candidate I do.

Officiant Come Holy Spirit, fill the hearts of your faithful people

All *And kindle in them the fire of your love.*

Officiant I have been crucified with Christ

All *It is no longer I who live, but Christ who lives in me.*

Officiant I count everything as loss

All *Because of the surpassing worth of knowing Christ Jesus my Lord.*

Officiant for His sake, I have suffered the loss of all things.

All *That I may gain Christ and be found in Him.*

Candidate Recognising my earlier Profession and subsequent departure from the family of the Third Order, I now ask for my re-admission.

Officiant My brother/sister N... giving thanks to God for his goodness, and asking for his forgiveness of your and our failures, will you follow Christ in the fellowship of St Francis, be open to the Holy Spirit and dedicate yourself anew to the joyful discipline of our Profession?

Candidate I will, the Lord being my helper.

I, N... give myself to our Lord Jesus Christ and make anew my Pledge to serve Him for the rest of my life in company with my brothers and sisters in the Third Order of the Society of St Francis, seeking to promote the spirit of love and harmony as the family of God and to live joyfully a life of simplicity and humble service after the example of St Francis.

I, N... undertake by God's grace to keep for one year my Personal Rule of Life (which I now place upon the altar).

Officiant N... on behalf of the Third Order of the Society of St Francis, I welcome you back, as a Tertiary, into our Order and fellowship.

May the Lord accept your offering and give you grace to persevere with joy.

All

Almighty God

Forgive what we have been,

bless what we are,

and direct what we shall be

through Jesus Christ our Lord, Amen.

The THIRD ORDER of the SOCIETY OF SAINT FRANCIS
NOMINATION FORM FOR OFFICE HOLDER

Title of Role.....

The **Candidate's** name.....

Address.....

.....

.....

.....

Postcode.....

Telephone No.....Mobile.....

E-mail address.....

Signed (**the Proposer**).....

Proposer's full name.....

Telephone Number.....

E-mail address.....

Signed (**the Seconder**).....

Seconder full name.....

Telephone number.....

E-mail address.....

Declaration by the candidate:

I agree to serve as.....for an initial period of three years if duly elected.

Signed (**the Candidate**).....

Date.....

The THIRD ORDER of the SOCIETY OF SAINT FRANCIS
ELECTION FORM FOR AREA OFFICE HOLDER

Title of Area Role.....

Voters must be a professed Tertiary within the Area (see TSSF Manual: Statutes:- F-5).

All professed Tertiaries are strongly encouraged to vote.

I vote for the following professed Tertiary for election to the office of (please put a cross in a box for one candidate only and sign and date the form below):

Name of Candidate.....

(Candidate's Tel No.....)

(Proposer's Name & Tel No.....)

(Secunder's name & Tel No.....)

Name of Candidate.....

(Candidate's Tel No.....)

Proposer's Name & Tel No.....)

Secunder's Name & Tel No.....)

Details of the elector

(please use capitals, except for signatures)

Signature.....

Full Name.....

Address.....

.....

Telephone No.....

E-mail address.....

NB. To be valid, this page of the voting form must be returned to the election organiser (address and details.....)

By No later than.....

Giving a Bequest - wording and notes

Pecuniary

I GIVE (free of tax) the sum of £000000 (amount in words) to

THE THIRD ORDER OF THE SOCIETY OF ST FRANCIS (charity No 1064356) c/o Lower Stonehouse Farm Brown Edge Stoke on Trent Staffordshire ST6 8TF

OR

Residue

MY TRUSTEES shall hold my Residuary Estate ON TRUST to divide and pay the same

as follows:

- a) as to 0% thereof for THE THIRD ORDER OF THE SOCIETY OF ST FRANCIS (charity no. 1064356)
c/o Lower Stonehouse Farm Brown Edge Stoke on Trent Staffordshire ST6 8TF
- b) Second Charity etc....

Wish or specific condition or general

I DECLARE that any legacy or payment made to a charitable organisation under this my Will shall be for its general charitable purposes

Precautionary clause

and I DIRECT that in

respect of the legacy or payment the receipt of a person who appears to be treasurer or other proper officer of the relevant organisation shall be a sufficient discharge to my Trustees and I FURTHER DIRECT that if at the date the legacy vests or the payment is due any organisation has ceased to exist or amalgamated with another charity or has changed its name ("the Defunct Charity") my Trustees shall pay the relevant legacy or entitlement to the charitable organisation which in their discretion consider most nearly fulfils the objects of the Defunct Charity

General Notes

It is recommended if you wish to leave a Legacy to Charity in your will that such a clause should be drawn up by a solicitor who will advise you of the different ways of doing so in accordance with your wishes.

The basic information the solicitor will require is the exact name of the charity and its charity number and contact address.

Legacies can be pecuniary. This is to say you are leaving a specific sum of money to the charity.

Legacies can be taken out of the Residuary Estate. This is to say the amount left after all other bequests and conditions have been met. This can be a specific sum or a percentage of the remaining balance. Percentages can have a considerable advantage as often we do not know what the residue will actually be and to specify a sum can be problematic in so far as there may not be sufficient to meet the bequest.

Your legacy should be specified as to what you intend the charity to do with it. The example shown allows the charity to spend the bequest as they see fit.

Solicitors urge care in making a binding condition as this may turn out to be inappropriate. See the explanation below.

Sometimes donors ask if they can leave a legacy to our charity for one of our charity's specific projects or activities. Is this possible?

Yes. There are two main ways that they can do this, either by making a gift subject to an expression of wish or making a gift subject to binding obligations as to its use.

Expression of wish?

What this means is that donors can request or express a wish, usually in their will, that your charity use their legacy for a particular purpose. For example, a donor may leave a legacy to an overseas aid charity and request that it be used in a particular country. Although your charity is not legally obliged to use the legacy in accordance with the donor's wishes, your charity will be under a moral obligation to try to comply if able to do so. The advantage of this type of legacy is that it gives flexibility in case the activities/projects of your charity change between the date of the will and the date of death (when the legacy takes effect) so your charity can take account of any changing circumstances.

What about gifts subject to binding obligations?

Donors can leave a legacy to your charity and state, in their will, that the legacy must be used for a particular purpose. For example, an educational charity might be given a legacy which must be used to fund an annual scholarship in the name of the donor. Or a religious charity might be left a sum to a specific fund which must be used for a specific cause. This type of legacy must be used for the purpose for which it is given.

Third Order of the Society of St. Francis (European Province)

HMRC GIFT AID DECLARATION FORM

I want to Gift Aid any donations I have made in the past 4 years or I make in the future to The Third Order of the Society of St. Francis.

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

Title (Rev, Mrs, Ms, Mr, Dr etc)

First name or initial(s)

Surname

Full home address

Post Code

Date

Please notify the charity if you:

- Want to cancel this declaration
- Change your name or home address
- No longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

There is now no need to sign the form (unless you want to!)

Please return by email to treasurer@tssf.org.uk

or by post to: John Lovatt, Provincial Treasurer TSSF, Lower Stonehouse Farm, Brown Edge, Stoke on Trent, ST6 8TF.

Tel: 01782 503090

Thank you

Third Order of the Society of St. Francis (European Province)

BANK STANDING ORDER FORM

To: (Bank/Building Society).....

Branch Address

(PLEASE PRINT).....

.....Post Code

Please pay to: THE THIRD ORDER OF ST. FRANCIS, The Co-operative Bank

P.O.Box 250, Delf House, Southway, Skelmersdale WN8 6WT;

Sort Code 08-92-99; Account No. 65622601

Quote ID Society)

(to be completed by the

Beginning immediately, and then until further notice

Every month three months six months year (Delete as appropriate)

the amount of: £.....(words.....pounds)

This cancels any existing Standing Order in my name payable to

The Third Order of the Society of St. Francis.

My full name (BLOCK LETTERS).....

My Address.....

My Account NumberSort Code.....

Signature.....Date of Signing.....



INCOME AND EXPENDITURE RETURN

AREA NAME

CLUSTER NAME

PERIOD COVERED BY THIS RETURN

Balance brought forward

Cash Bank

£

Less cheques uncleared from

- see details below

Total (A)

Income

- Amount received from Province
- Area Meeting collections
- Other monies received (specify)
- Hillfield Weekend
- Quiet Day
- 2014 Area
- Retreat

TOTAL (C)=A+B

Expenditure

- Travel Expenses
- Photocopying/Statinery/Postage
- Telephone
- Cost of Area Meetings - Venue
- Cost of Area Meetings - Visitors
- Purchase of Formation/Training Material
- Cluster Expenses
- Other Expenses (please specify)
- Quiet Day 2014
- Area Retreat 2015
- Area Meeting refreshments

Total Expenditure D

Balance E = (C - D)

Balance carried forward

Cash Bank

Total (should = E)

