



Sustaining an effective environment for enhancing ‘formation for mission’ within Mercy Ministry Companions

Introduction

This Resource for Ministry Board Chairs and Directors, Senior Leaders and Trustee Directors assists the process of sustaining an effective environment for enhancing formation for mission within Mercy Ministry Companions (MMC). It is built on an analysis of our Core documents and interviews with Ministry Board Chairs and Senior Leaders, followed by consultation on an initial draft with the Trustee Directors, Boards and Senior Leaders in mid-2022.

If MMC is to be an authentic sign of God’s mercy, the interwoven threads or components which contribute to its success need to be underpinned by:

- i. A strong focus on mission
- ii. Adequate preparation for people in leadership roles
- iii. Clear roles, expectations and mutual accountability
- iv. Strong communication and relationships among all involved in the governance and leadership of ministries
- v. Effective working relationships with Church authorities and other Church entities

[adapted from *Sponsorship Resources for Sponsors*, (2005) Catholic Health Association of the United States, p. 6]

These five elements can inform the formation framework, policies, programs and offerings within MMC and each of its ministries.

Induction and ongoing formation for mission are undertaken by each sphere of ministry governance and leadership within MMC. To enable continuous improvement, adequate resourcing of induction and ongoing formation is also required, as are appropriate forms of qualitative and quantitative evaluation of formation programs.

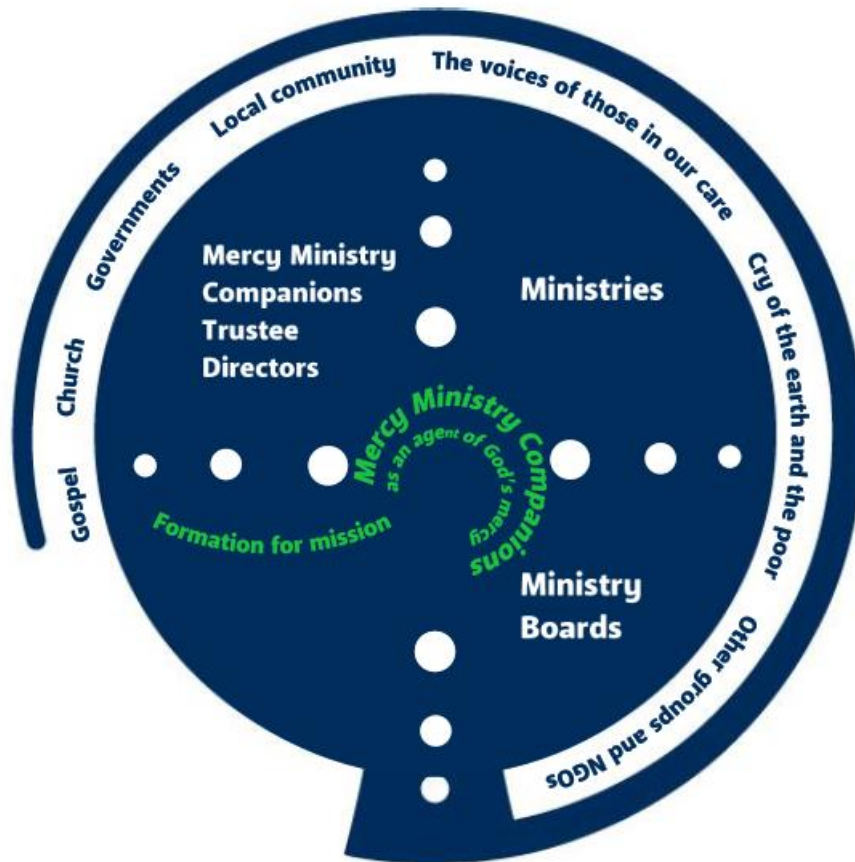
Reporting on formation for mission contributes to the exercise of mutual accountability and shared responsibility for ensuring that fidelity to mission, vision and values characterizes all that happens within MMC. Like any faith-based organization, ‘mission-drift’ can happen if a strategic focus on mission is not maintained organization-wide. Sustaining an effective environment for enhancing formation for mission becomes an integral component of our risk-management and our related efforts to prevent ‘mission-drift’.

Context for mission-focused formation

As a Church authority, MMC participates in the mission of Jesus. In the spirit of the Gospel and in the tradition of Catherine McAuley and our other founders, its ministries of Community Service, Education and Health and Aged Care respond to the needs of the people they serve.

MMC, as an Australian Church Authority committed to reconciliation, acknowledges the First Nations peoples, especially those on whose lands our ministries are located. We respectfully recognize Elders past and present and endorse the Uluru Statement from the Heart.

The diagram identifies key components shaping our approach to formation.



The outer rim shows the multi-faceted context for our ministries. It is inspired by the Gospel and influenced by the Church, governments, other like-minded groups and NGOs, our ministry staff, our local communities and culture and the voices of the women, men, children and families in our care. Those involved in the ministries of governance and leadership within Mercy Community Services Australia (MCSAL), Mercy Education (MEL) and Mercy Health Australia (MHA) exercise their responsibilities in a spirit of service, mindful of the call to care for all within our common home.

All who contribute to the life and mission of MMC are invited to engage in ongoing formation. This engagement assists us to undertake our roles as people who witness to God's mercy. It may also help us to understand and appreciate our contribution to achieving the stated mission or purpose and vision of our Mercy ministry, underpinned by the core values which shape the life of the organization.

In addition to scheduled formation opportunities, a vibrant mercy culture within our ministries can provide many opportunities for informal formation to occur through our interactions with others and our attention to the signs and symbols in the natural and built environments.

What do we understand by the term 'formation for mission'?

There are many ways of describing what 'formation' is and how it might be undertaken. The National Catholic Education Commission (NCEC) Resource '*Leading Formation for Mission: A Practical Guide*' offers two helpful ways of understanding the meaning and the process and these are included here as a guide in our ongoing reflection and conversation within MMC.

The NCEC (2017, p. 9) describes formation as *“an intentional, ongoing and reflective process that focuses on the growth of individuals and communities from their lived experiences, in spiritual awareness, theological understanding, vocational motivation and capabilities for mission and service in the Church and the world.”*

There are many aspects to ongoing mission-focused formation for people in their various roles within our ministries. Those participating in an Induction program as casual or short-term employees or volunteers will have different needs and responsibilities from those who are middle managers or those who are Board Chairs, Directors, CEOs, Principals or Senior Leadership Team members.

Formation is not a ‘one off’ or ‘one size fits all’ event. An engaging formation process appropriately recognizes that, as adults, we learn in different ways and bring a range of personal and professional experiences to our ministry within MMC. The NCEC (2017, p. 14) describe this formation process as *“systematic, collaborative, graduated and ongoing. This process holds itself within relationships built on accompaniment centred on the self, others, creation and God.”*

If we are to establish, nurture and sustain engaging and integrated formation for mission programs within MMC, there are aspects to which we need to continue to give our attention and creative talents.

Aspects of an integrated approach to formation for mission

The initial consultation on existing mission-focused reporting practices identified cascading areas of responsibility, a variety of formation-related terms and a range of existing reporting procedures relating to formation for mission within MMC. All involved with MMC (Ministries, Ministry Boards and MMC Trustee Directors), especially those with specific mission-related responsibilities, are encouraged to work collaboratively to establish, nurture and sustain a strong culture of ongoing formation. In doing so, we ‘till the soil’ together and create an effective environment for enhancing formation for mission.

As illustrated in the previous diagram, our involvement in and commitment to ‘formation for mission’ flows out of MMC’s core purpose to be an agent or face of God’s mercy. This Resource document acknowledges three (3) spheres of responsibility for mission-focussed reporting within MMC, namely:

1. the processes used by ministries reporting to their Ministry Boards
2. the processes used by Ministry Boards reporting to the MMC Trustee Directors and
3. the processes used by MMC Trustee Directors reporting to the Dicastery for Institutes of Consecrated Life and Societies of Apostolic Life (formerly CICLSAL) in Rome.

The 2022 consultation on current practices for reporting on formation for mission within MMC identified a range of levels, types and frequency of reporting on formation for mission. Appendix 1 contains a synthesis of the information gathered and suggests a timeline for reporting within MMC. It is designed to enable each group to exercise its responsibilities in a timely manner while avoiding ‘over-reporting’ and unnecessary duplication. As a result of the consultation, MMC Trustee Directors have agreed that the suggested reporting procedures and timeline will be trialled for 12 months during 2023 and reviewed in early 2024.

An accompanying document, ***An Overview of current ‘formation for mission’ Reporting practices within Mercy Ministry Companions***, contains examples of mission-related roles and responsibilities identified in existing Core documents and examples of existing practices of ministries, Boards and Trustee Directors within MMC. The material in this companion document will hopefully assist in the

development of an integrated approach to formation for mission and its associated reporting schema.

The following six (6) aspects inform an integrated approach to formation for mission. Ministries, Ministry Boards and Trustee Directors are invited to consider each aspect in their documentation, planning, implementation and evaluation of their formation for mission program. These aspects are not designed to become a 'checklist' but are envisaged as key lenses through which we can critique our evolving program of formation for mission and aim to embed 'best practice'.

One: Articulating mission-focused responsibilities in Core documents

Responsibilities for formation for mission within MMC are outlined in various Core Documents including Constitutions, Statutes, Statements of Mission or Purpose, Vision and Values, Strategic Plans/Frameworks and Strategic Goals. The understanding of the cascading responsibilities will be enhanced if all involved with MMC are aware of their specific responsibilities as outlined in their core documents.

For Ministries, core documents include:

-  Ministry Statements of Mission or Purpose and Vision
-  Core Values
-  Strategic Plans or Frameworks and related goals
-  Policies, Procedures, Plans and Programs for Induction and ongoing formation for mission within the ministry

For Ministry Boards, core documents include:

-  Ministry Constitutions
-  Statements of Mission or Purpose and Vision
-  Core Values
-  Code of Ethics (where applicable)
-  Strategic Plans or Frameworks and related goals
-  Formation Policies, Plans and Programs for Induction and ongoing Formation for mission within the Board

For MMC Trustee Directors, core documents include:

-  MMC Constitution and Statutes
-  Statements of Mission or Purpose and Vision for MMC
-  Core Values
-  Strategic Plan or Framework and related goals
-  MMC Theological framework
-  MMC ethical framework
-  Formation Policies, Procedures, Plans and Programs for Induction and ongoing formation for Trustee Directors and MMC staff members
-  Appendix J (overview of Formation within MMC) in submission of petition to CICLSAL for establishing MMC
-  Association of Ministerial Public Juridic Persons (AMPJP) Formation Framework

Action suggested during the 12-month trial period:

It is suggested that each Ministry, Ministry Board and MMC Trustee Directors critique their existing Core documents to ensure that responsibilities for formation for mission are clearly articulated in

the relevant documents. If necessary, appropriate amendments to Core documents are undertaken or anticipated as part of a cyclical review of core documents.

Two: Designating individuals or groups with responsibility for ‘formation for mission’

MMC Trustee Directors, Ministry Boards and ministries within MCSAL, MEL and MHA identify individuals and/or groups with designated responsibility for aspects of mission formation. There are different terms used to denote roles and Board Committees such as Mission and Education, Identity and Ethos and Culture.

Some ministries resource a team of people while others have a designated person holding responsibility for a particular component of formation for mission such as Induction of new staff.

Building internal capacity for planning, leading and evaluating ongoing formation for mission is important at ministry, Board and Trustee Director levels. Collaboration across ministries and between Ministry Boards and MMC Trustee Directors holds great potential for enhancing capacity in both the shorter and longer terms. Some initiatives are already in place and further exploration of what might be possible is underway within the newly formed MMC Mission Coordinators’ Network.

Action suggested during the 12-month trial period:

It is suggested that each Ministry, Ministry Board and MMC Trustee Directors critique their existing documentation, leadership and Committee structure and role descriptions to ensure that responsibilities for formation for mission are clearly articulated. If necessary, appropriate amendments are undertaken or anticipated as part of a regular review of roles and responsibilities.

Three: Implementing Policies, Plans and Procedures encompassing formation for mission

Active Formation Policies, Plans and Procedures are important contributors to an integrated approach to formation for mission. Whether they are comprehensive, well-established or a ‘work in progress’, they provide a framework and a reference point against which we can critique current practice.

A range of mission-focused procedures or activities were identified by ministries e.g. recording participation in ongoing formation activities within staff personnel records; including Prayer and Reflection in regular meetings and at staff gatherings or special occasions; maintaining a focus on mission, vision and values in ministry newsletters and communication to staff; incorporating conversations about values-informed behaviour in Annual Performance Reviews.

Some Boards identified ‘Formation for mission’ as an agenda standing item at Board meetings (separate from receiving mission-related Reports from Board Committees) with regular opportunities for ongoing formation for Directors provided within meetings and as part of retreats or planning days.

Action suggested during the 12-month trial period:

It is suggested that each Ministry, Ministry Board and MMC Trustee Directors critique their existing Policy, Plans, Procedures and Programs for mission-focused Induction and ongoing formation to ensure that they are clearly articulated and being implemented in a timely manner. If necessary, appropriate amendments are undertaken or anticipated as part of a regular cycle of review

Four: Engaging all ministry personnel in appropriate formation Programs

Ministries, Ministry Boards and Trustee Directors identified current initial and ongoing formation programs appropriate to the needs of various groups of people, the roles they undertake within ministries or Boards and their working hours. The following types of programs were identified – Induction and Orientation of new staff; ongoing formation for existing staff, Managers, Executive teams, CEOs/Principals, Board Directors and Board Chairs, MMC Trustee Directors and MMC staff.

Some programs are accessed within ministries or in cross-ministry opportunities offered within MMC, while some opportunities are accessed externally. It is recognized that all people who work within MMC need access to formation opportunities, however the ability of some ministries to maintain and expand their initial and ongoing formation programs has been negatively affected by COVID 19 restrictions over the past 2-3 years.

A Formation Framework for MMC will be developed by MMC Trustee Directors, after consultation with the ministries and Boards. In the interim, the ISMAPNG Governance Formation Schema, published in April 2020, and the Formation Framework of the Association of Ministerial PJPs, published in June 2021, can provide guidance for ministries and Boards in the creation of their Formation Plans and programs.

Where ministries have a charism formed from more than one founder, it is important to recognize the gifts of the Spirit emanating from the vision of these founders and the founding congregations. Using the Gospel as a base and drawing on the insights of founders, the founding stories provide building blocks for the contemporary expression of core purpose and vision.

Action suggested during the 12-month trial period:

It is suggested that each Ministry, Ministry Board and MMC Trustee Directors critique their existing Induction and ongoing formation for mission Programs, levels of staff participation and personnel record-keeping procedures to ensure that appropriate and timely opportunities are offered and associated recordkeeping is up to date. If necessary, appropriate amendments are undertaken and changes implemented in a timely manner.

Five: Resourcing Induction and ongoing formation for mission

Formation for mission within MMC needs to be appropriately resourced if it is to be recognized as a priority and if it is to be effective. As mentioned earlier, ‘mission drift’ can occur quite quickly, at significant risk to the organization, if mission-focused formation is not supported by appropriate levels of resources. Aspects of funding include allocation for material resources, for internal and external formation offerings, for time allocations to mission-related roles and for time allocations for formation activities at meetings.

Resourcing is reflected in annual budgets approved at Ministry, Board and MMC Trustee Director levels. It is recognized that there are many challenges associated with preparing balanced budgets amid competing priorities and needs for time and money. Larger and smaller ministries have challenges to address in resourcing formation for mission.

Action suggested during the 12-month trial period:

It is suggested that each Ministry, Ministry Board and MMC Trustee Directors critique their resource allocations for Induction and ongoing formation for mission to ensure that appropriate budget allocations are made and suitable resources provided to support internal and external programs and

staff participation. If necessary and where possible, appropriate amendments or adjustments are made or anticipated as part of the annual budget process.

Six: Embedding appropriate and timely means of accountability and evaluation in reporting processes

Given the cascading nature of responsibilities for formation for mission, each sphere of governance and leadership is called to exercise accountability and responsibility to enhance mission effectiveness within MMC. This commitment is undertaken with integrity and in a timely manner.

An ongoing challenge for ministries, Boards and Trustee Directors is the exploration, development and implementation of ways to measure mission effectiveness and to report on the impact of formation offerings meaningfully and effectively, using a mix of quantitative (statistical) and qualitative (e.g. quotes, video clips, photos) data.

As previously mentioned, reporting on achievements and challenges is one component of sustaining an effective environment for enhancing formation for mission. The MMC Formation Coordinator is also exploring ways of providing practical support to ministries in the development and use of suitable evaluation strategies for our various formation offerings.

Action suggested during the 12-month trial period:

It is suggested that each MMC Ministry, Ministry Board and the Trustee Directors critique their existing means of evaluating formation for mission offerings and their incorporation of qualitative and quantitative data into existing reporting practices. In light of the suggestions outlined in Appendix 1, if necessary and where possible, appropriate amendments or adjustments to existing evaluation and reporting practices should be undertaken.

Conclusion

When used with reference to Appendix 1 and in conjunction with the companion document “**An overview of current ‘formation for mission’ Reporting practices within Mercy Ministry Companions**”, it is hoped that this resource will assist ministries, Boards and Trustee Directors to create and sustain an effective environment for enhancing formation for mission within MMC.

Following the implementation of the suggested processes and timeline during 2023, a review will be conducted in early 2024. The Trustee Directors thank you for collaboration in this process of reflection on our various means of documenting ‘formation for mission’ across MMC and look forward to receiving your insights during the year ahead.

For further information about any material in this Resource please contact:

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This document takes effect from 6 February 2023

Appendix 1: Summary of suggested formation for mission reporting processes (topic focus and timeline) within MMC

MMC to DICLSAL	Each meeting	Quarterly	Half-yearly	Annually
As a pontifical Ministerial Public Juridic Person, MMC is required to provide an Annual Report to the Dicastery for Institutes of Consecrated Life and Societies of Apostolic Life (formerly CICLSAL). As outlined in MMC's core documents, TDs have specific responsibilities in relation to formation for mission. This component of the MMC Annual Report draws on documentation of the mission-related activities of the TDs and on the accurate and timely information provided to TDs by each Ministry Board.				1. Status of MMC's Core documents 2. Existence and implementation of MMC Formation Policy, Plan and procedures 3. Role of Formation Coordinator, Board Formation Committee and Formation Reference Group 4. Confirmation that each Ministry Board has a Formation Policy and Plan 5. Annual formation offerings for TDs 6. Formation opportunities for prospective TDs and Directors, including Induction for new appointees 7. Annual cross-ministry and ministry-specific formation offerings for Directors and senior ministry personnel 8. MMC Annual Conference – focus, participants etc 9. Types and frequency of communication regarding formation for mission within MMC 10. Resources allocated to formation for mission in annual budget 11. Confirmation that each TD meeting and each Board meeting has a formation component 12. Summary of evaluations of formation offerings 13. Summary of achievements and challenges in nurturing a culture of ongoing formation for mission within MMC
Ministry Boards to MMC TDs	Each TD meeting	Quarterly	Half-yearly	Annually
As outlined in MMC's core documents, TDs and Boards have specific responsibilities in relation to formation for mission. After this consultation on the results of the mapping	Minutes of Ministry Board meetings come to TDs – includes Ministry Board Formation component		Update on implementation of mission-focused aspects of Ministry Strategic Plan and goals	1. Update on status of core Board documents 2. Roles and responsibilities of personnel with mission/formation coordination responsibilities 3. Role of Board Mission and Identity or Formation Committee -TOR, membership, meeting frequency etc 4. Status of Board Formation Policy, Plan and procedures 5. Content and processes for Board Formation program 6. Participation in Induction by new Directors

exercise, TDs and Ministry Boards will agree on a framework and timeline which enables TDs to receive the information they require to meet their responsibilities for formation for mission.				7. Content and processes for Board-sponsored formation of Senior Ministry leaders 8. Participation of Directors and senior ministry leaders in MMC-sponsored formation 9. Participation levels of all ministry staff in ongoing formation 10. Summary of evaluations of formation offerings 11. Formation resourcing component of annual Board and ministry budgets 12. Summary of achievements and challenges in nurturing a culture of ongoing formation for mission within the Ministry Board
Ministries and Board Committees to Ministry Boards	Each Board meeting	Quarterly or as determined by Board	Half-yearly	Annually
As outlined in MMC's core documents, Boards and Ministry leaders have specific responsibilities in relation to formation for mission. After this consultation on the results of the mapping exercise, Ministry Boards and their ministries will agree on a framework and timeline which enables Boards to receive the accurate and timely information they require to meet their responsibilities for formation for mission.	Guided by an agreed formation framework or thematic approach, formation aspects are included in the CEO's Report to the Board and, as appropriate, in the Mission/Identity, Ethos and Culture or Formation Coordinator's Report	The Board Mission and Identity, Ethos and Culture or Formation Committee reports to the Board		1. Update on status of Ministry core documents 2. Update on mission-focused roles and responsibilities within the ministry 3. Update on status of Formation Plan, Policy and procedures and their implementation 4. Update on implementation of mission-focused aspects of Ministry Strategic Plan and goals 5. Participation levels of ministry staff in ongoing formation 6. Summary findings of evaluation of formation opportunities, using quantitative and qualitative data as appropriate 7. Report on budget allocation for formation resources 8. Summary of achievements and challenges in nurturing a culture of ongoing formation for mission within the ministry

