

General Guidelines for Formators

Accompanying Intellectual Formation

1. Hold Intellectual Formation as a Formative Process, Not Mere Performance

Guideline: Formators should consistently emphasize that intellectual formation is about **forming the person**, not just producing correct answers, good papers, or academic success.

Implications

- Value growth over grades
- Pay attention to *how* formees think, not only *what* they conclude
- Resist reducing formation to evaluation alone

Formative Lens: Intellectual maturity unfolds gradually and unevenly; accompaniment must respect this rhythm.

2. Integrate Intellectual, Human, Spiritual, and Missionary Dimensions

Guideline: Avoid treating intellectual formation as an isolated academic domain.

Practical Orientation

- Connect study with prayer, discernment, and mission
- Help formees reflect on how ideas shape attitudes, relationships, and decisions
- Encourage integration rather than compartmentalization

Formative Lens: A fragmented mind often mirrors a fragmented inner life.

3. Model the Intellectual Attitudes You Wish to Form

Guideline: Formators are the **first textbooks** formees read.

Model Especially

- Intellectual humility
- Openness to learning
- Willingness to revise one's own thinking
- Respectful engagement with disagreement

Formative Lens: Formees learn intellectual virtues more from *witness* than instruction.

4. Prioritize Processes Over Immediate Outcomes

Guideline: Attend to habits, methods, and patterns rather than isolated successes or failures.

Practical Orientation

- Observe recurring ways of reading, writing, listening, or discussing
- Name patterns gently and consistently
- Help formees set realistic, concrete growth goals

Formative Lens: Formation is revealed in consistency, not brilliance.

5. Create a Climate of Psychological and Intellectual Safety

Guideline: Learning deepens where fear diminishes.

Practical Orientation

- Protect formees from ridicule, shaming, or excessive comparison
- Normalize struggle, confusion, and revision
- Intervene promptly when discussions or feedback become aggressive or dismissive

Formative Lens: Fear blocks thinking; safety enables depth.

6. Encourage Questioning Without Undermining Foundations

Guideline: Support critical inquiry while helping formees remain rooted in faith, tradition, and vocation.

Practical Orientation

- Distinguish questioning from cynicism
- Help formees articulate doubts clearly rather than suppress them
- Accompany tensions instead of rushing to resolution

Formative Lens: Unasked questions weaken faith; accompanied questions mature it.

7. Discern Emotional and Psychological Dynamics Behind Intellectual Behaviours

Guideline: Intellectual difficulties often mask emotional realities.

Be Attentive To

- Defensiveness in discussions
- Perfectionism in writing
- Avoidance of critique
- Excessive dependency on authorities or texts

Formative Lens: How one thinks is often shaped by how one feels.

8. Use Accompaniment Conversations Strategically

Guideline: Intellectual formation should appear regularly in personal accompaniment.

Helpful Questions

- How are you experiencing your studies right now?
- What practice is most challenging for you?
- Where do you notice growth or resistance?
- How does your intellectual work affect your prayer or mission?

Formative Lens: Reflection transforms activity into formation.

9. Gradually Increase Responsibility and Autonomy

Guideline: Formees must move from dependence to discernment.

Practical Orientation

- Early stages: provide structure, guidance, and reassurance
- Middle stages: invite critique and synthesis
- Later stages: expect initiative, integration, and leadership

Formative Lens: Autonomy is not given abruptly; it is cultivated patiently.

10. Guard Against Ideological Rigidity and Intellectual Polarization

Guideline: Formation must resist closed systems of thought.

Practical Orientation

- Encourage engagement with diverse perspectives
- Help formees identify hidden assumptions
- Foster capacity for dialogue across differences

Formative Lens: Rigidity often signals fear more than conviction.

11. Foster Communal Responsibility for Learning

Guideline: Intellectual formation is not an individualistic journey.

Practical Orientation

- Promote peer learning and peer accountability
- Encourage shared reflection on group processes
- Emphasize communal discernment

Formative Lens: Truth matures when it is carried together.

12. Evaluate Growth Holistically

Guideline: Assessment should serve formation, not replace it.

Look For

- Increased clarity and coherence
- Greater openness to feedback
- Improved integration of theory and life
- Growth in humility and responsibility

Formative Lens: The deepest fruits of intellectual formation are often invisible but enduring.

13. Keep Mission as the Horizon of Intellectual Formation

Guideline: Always orient intellectual formation toward service.

Practical Orientation

- Ask how learning shapes pastoral sensitivity
- Challenge intellectual arrogance or self-referential study
- Emphasize wisdom over accumulation

Formative Lens: We study not to dominate knowledge, but to serve people and truth.

Conclusion: Intellectual formation succeeds when formees learn not only to think well, but to think truthfully, humbly, and for the sake of mission.

Formators' Checklist – Intellectual Formation

A practical tool for accompanying Critical Reading, Group Discussions, Academic Writing, Lectures & Seminars, Contextual Learning, and Peer Reviews

1. Foundational Orientation

- ☐ Do I present intellectual formation as **formative**, not merely academic?
- ☐ Do I consistently link study with **human growth, spiritual life, and mission**?
- ☐ Do I emphasize process and habits more than grades or outcomes?

2. Climate and Environment

- ☐ Is there a climate of **psychological and intellectual safety**?
- ☐ Are mistakes, questions, and revisions normalized as part of learning?
- ☐ Do I intervene promptly when ridicule, dominance, or fear appears?

3. Modelling by the Formator

- ☐ Do I model **intellectual humility and curiosity**?
- ☐ Do I show openness to revising my own views?
- ☐ Do I demonstrate respectful engagement with disagreement?

4. Critical Reading

- ☐ Do formees read actively rather than passively?
- ☐ Are they able to identify thesis, assumptions, and implications?
- ☐ Do I accompany *how* they read, not only *what* they conclude?

5. Group Discussions

- ☐ Is participation balanced (neither silence nor domination)?
- ☐ Are differences engaged without defensiveness?
- ☐ Do discussions aim at **shared understanding**, not winning arguments?

6. Academic Writing

- ☐ Is writing used as a tool to clarify thinking, not impress?
- ☐ Do formees demonstrate structured argumentation and responsible sourcing?
- ☐ Is feedback framed and received as a formative gift?

7. Lectures and Seminars

- ☐ Do formees listen for **frameworks and meaning**, not only details?
- ☐ Are they able to formulate thoughtful questions?
- ☐ Do I help them synthesize lectures rather than accumulate notes?

8. Contextual Learning

- ☐ Are formees observing contexts before evaluating them?
- ☐ Do they integrate theory with lived reality?
- ☐ Do I guard against imposing ideas without listening to people?

9. Peer Reviews

- ☐ Is feedback specific, respectful, and focused on ideas?
- ☐ Are formees learning to receive critique without defensiveness?
- ☐ Do I watch for competitive or dismissive dynamics?

10. Accompaniment and Discernment

- ☐ Do I regularly address intellectual formation in personal accompaniment?
- ☐ Am I attentive to emotional dynamics behind intellectual behaviours?
- ☐ Do I help formees identify recurring patterns over time?

11. Growth and Autonomy

- ☐ Are expectations adapted to the stage of formation?
- ☐ Do I gradually increase responsibility and intellectual autonomy?
- ☐ Are formees learning to self-evaluate and self-correct?

12. Missionary Horizon

- ☐ Is intellectual formation oriented toward **service of people and mission**?
- ☐ Do I challenge intellectual rigidity or arrogance when it appears?
- ☐ Do I keep wisdom, not accumulation, as the final goal?

Core Formative Question for the Formator

Am I helping formees become people who think clearly, listen deeply, discern wisely, and place their intelligence at the service of truth, community, and mission?

This checklist may be used for self-evaluation, team review, or annual formation planning.

How this checklist can be used

- **Personal self-evaluation** for formators
- **Team reflection tool** in formation meetings
- **Annual or semester planning guide**
- **Diagnostic tool** to identify gaps or imbalances in accompaniment

Scored Evaluation Rubric – Intellectual Maturity

How to Use This Rubric

- This rubric is **formative**, not punitive.
- It may be used by **formators**, **formation teams**, or for **guided self-assessment**.
- Scores help identify **growth patterns**, not rank persons.

Scale Used (1–4):

- **1 – Emerging:** early, fragile, or inconsistent development
- **2 – Developing:** growing awareness and practice, still uneven
- **3 – Consolidating:** stable, reliable practice with minor gaps
- **4 – Mature:** integrated, consistent, and responsible practice

1. Relationship to Truth

Indicator	1	2	3	4
Openness to truth and complexity	Seeks certainty, avoids ambiguity	Accepts complexity with support	Engages complexity calmly	Lives truth with humility and perseverance

Use of authority and sources	Uncritical dependence	Discerns with guidance	Evaluates responsibly	Integrates authority with critical freedom
Intellectual humility	Defensive or rigid	Aware but inconsistent	Generally humble and open	Stable humility and integrity

Score: ☐1 ☐2 ☐3 ☐4

2. Quality of Thinking

Indicator	1	2	3	4
Clarity of thought	Fragmented or vague	Increasing structure	Clear and coherent	Synthesized and insightful
Logical reasoning	Reactive or emotional	Partially logical	Mostly sound reasoning	Rigorous and fair reasoning
Critical evaluation	Minimal critique	Identifies issues	Evaluates arguments well	Integrates multiple perspectives

Score: ☐1 ☐2 ☐3 ☐4

3. Learning Dispositions

Indicator	1	2	3	4
Initiative in learning	Passive or dependent	Some initiative	Regular initiative	Self-directed learner
Response to feedback	Defensive or avoidant	Accepts with effort	Uses feedback constructively	Actively seeks feedback
Perseverance	Gives up easily	Variable commitment	Generally perseverant	Resilient and disciplined

Score: ☐1 ☐2 ☐3 ☐4

4. Communicative Competence

Indicator	1	2	3	4
Clarity of expression	Unclear or verbose	Improving clarity	Clear and respectful	Precise and engaging
Listening skills	Poor listening	Listens selectively	Active listener	Deep, empathic listener
Dialogue and disagreement	Defensive or dominant	Manages with help	Engages constructively	Facilitates dialogue

Score: ☐1 ☐2 ☐3 ☐4

5. Integrative Capacity

Indicator	1	2	3	4
Theory–life integration	Fragmented	Occasional links	Regular integration	Deep, organic integration
Contextual discernment	Rigid application	Some adaptation	Discerns contextually	Wise, nuanced discernment
Reflective depth	Descriptive only	Emerging reflection	Reflective and critical	Contemplative depth

Score: ☐1 ☐2 ☐3 ☐4

6. Communal and Ecclesial Intelligence

Indicator	1	2	3	4
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Group participation	Withdrawn or dominating	Uneven participation	Responsible contributor	Builds communal learning
Peer feedback	Resists or dismisses	Accepts with effort	Gives/receives well	Models charitable critique
Ecclesial sense	Individualistic	Growing awareness	Thinks with community	Ecclesial discernment

Score: ☐1 ☐2 ☐3 ☐4

7. Autonomy and Responsibility

Indicator	1	2	3	4
Ownership of learning	Dependent	Partial ownership	Responsible ownership	Full intellectual autonomy
Self-evaluation	Limited awareness	Emerging insight	Honest self-assessment	Accurate and mature self-knowledge
Ethical responsibility	Minimal awareness	Growing awareness	Responsible conduct	High integrity

Score: ☐1 ☐2 ☐3 ☐4

8. Mission-Oriented Wisdom

Indicator	1	2	3	4
Orientation to service	Knowledge as possession	Emerging service sense	Knowledge for mission	Wisdom for service
Pastoral sensitivity	Limited awareness	Growing sensitivity	Applies learning pastorally	Wise pastoral judgment
Intellectual humility in mission	Arrogant or detached	Aware but uneven	Humble and realistic	Servant-minded wisdom

Score: ☐1 ☐2 ☐3 ☐4

Overall Discernment (Not a Numerical Average)

Strengths observed:

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Key growth areas:

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One concrete objective for the next period:

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The goal of intellectual formation is not high scores, but mature thinkers who listen deeply, discern wisely, and place their intelligence at the service of truth, community, and mission.

This rubric may be adapted for self-assessment, accompaniment conversations, or formation team reviews.

What this rubric offers

- **4-point developmental scale** (Emerging → Developing → Consolidating → Mature)
- Covers **all key dimensions** of intellectual maturity
- Includes **qualitative discernment space**, not just scores
- Suitable for **initial & ongoing formation**
- Can be used for **self-assessment, accompaniment, or team review**

Best ways to use it in formation

- **Mid-year / annual accompaniment review**
- **Formation team discernment meetings**

- **Tracking growth across years** (compare rubrics over time)
- **Guided self-assessment** followed by dialogue with a formator

Important formative note

This rubric is **not meant to be averaged mechanically**.

The real value lies in:

- patterns across dimensions
- movement over time
- conversation it generates