

Background : Today's Challenges for the OFS

1. **Challenges for OFS-USA**—an excerpt from the Pre-Visitation Questionnaire from the 2016 Pastoral and Fraternal Visitation of the National Fraternity ([Visitation](#)).

2. **The *Instrumentum Laboris*** —the working document for the 2017 OFS General Chapter outlines some 'management' challenges for the entire Order, and offer eight Priorities and Proposals ([Instrumentum](#)). For a more detailed version of the proposals, the Conclusive Document with the Terms of Reference is available on the OFS-USA website (<https://secularfranciscansusa.org/2017-general-chapter-conclusions/>).

3. **How Should an Order Like the OFS Be Managed at All Its Levels?** — a document from the XIV General Chapter in 2014 ([p](#)) . See especially the following sections for further insight into the most important issues facing the Order today.

1. Why do we have to address this theme? pp. 1-3

2. Nature of the Order pp. 3-8

3. Fundamental Problems pp. 9-10

Visitation of National Fraternity of the Secular Franciscan Order—USA
To be held October 31 - November 6, 2016

(Excerpt) QUESTIONNAIRE FOR THE FRATERNAL AND PASTORAL VISITS
To the National Fraternities

Are there particular problems and/or serious problems on the national fraternity?

The National Fraternity in the US faces a number of challenges, including:

- **Distance**---see map

The distribution of Secular Franciscan fraternities and members throughout the US is far from uniform. Regions range in area from 815,727 sq. mi. to 1,443 sq. mi., and in OFS population density from 1 Secular / 2640 sq. mi. to 1 Secular / 2.48 sq. mi., a 1000-fold difference. As can be seen on the Demographic Map, our membership is concentrated on the East Coast, particularly in the northeast (red), with pockets surrounding Chicago and on the West Coast. The midsection and western half of the country, while comprising 76 % of our land area (yellow), contains only 24% of our 13,320 Seculars and candidates in its 11 Regions. Ten of the Regions have areas greater than 100,000 sq. mi., and within this large area, have on average 15 local fraternities with less than 300 members in total. Distance poses problems for the local fraternities, affecting everything from the timing of their gatherings to the possibility of doing joint ministry, to finding a Spiritual Assistant willing to travel to be with them. Distance is even more problematic for these large Regions, who struggle to bring their Regional Councils and Executive Councils together for meetings. Frequently Regions resort to dividing their local fraternities into more manageable geographic areas (clusters), which can then be encouraged to interact for formation and social purposes.

- **“Aging” membership / dwindling numbers**---a general perception in the US is that our Order is an aging one, our numbers continually dwindling as our members meet sister Death, and then not being replenished by new vocations.

Over recent years, our membership has indeed steadily declined, from 17, 634 professed members at the end of 1999; to 15,827 in 2004; 14,262 in 2008; 13,430 in 2012, and 12,244 in 2015. In addition, it’s true that the vast majority of us are middle-aged or older. Two-thirds (66%) of our professed members are between the ages of 56 and 75, with an additional 21% aged 76 or older. Only 2.6% of us are under the age of 45.

However, it is misleading to ascribe the trend toward aging in the Order to a lack of new vocations. In fact, the number of candidates has stayed relatively constant from 2004 to 2015 (1079 and 1076, respectively). Moreover, in a survey of the membership conducted earlier this year, it was found that barely half (51%) of those who responded had been professed for > 10 years, while 41% had been professed ≤ 10 years and 8% were in formation. A lack of vocations *per se* is not really the problem.

Looking at the age distribution of those in formation and the newly professed is most instructive here. Two thirds of our newly professed (<5 years) are between 56-75 years of age, and 15% are 76 or older, meaning 80% of the newly professed are over the age of 55. Only 5.6% are less than 45 years old. Of those in formation, 74% are over the age of 55, and fully 90% are over 45. The reason our age demographic is being maintained is because we are forming and professing people of the same age as we are ourselves. If we want to change this picture, the challenge before us---and before our Vocations Committee---is to find ways to help fraternities appeal to and foster the Franciscan vocations of younger Catholics. To this end, the Social Media Subcommittee of the Vocations Committee has been working very hard to develop a social media web landing site, as well as drafting a Vocations Outreach Communications Plan.

- **Preparation for Leadership in the Order**---As might be gathered from the above, our membership is mature and rich in life experience, but virtually half of our members surveyed have come quite recently to their Franciscan vocation. Their relative newness to the Franciscan way of life means that some of our new leaders lack the depth of experience and history desirable for serving in leadership. Some Regions organize regular leadership workshops to assist newly elected council members in understanding their roles as servant leaders. We have also had national workshops on servant leadership in 2015 and 2008.
- **Communications**---Continual attention to improving communications at all levels of the Order is an ongoing challenge. Besides the basic need for transparency and keeping people informed, we need better ways to bring people together and bridge distances. We have the sense that good communications are key to continued growth. Our Communications Committee is charged with reviewing and improving our communications efforts in a wide range of areas. Over the last three years, they have
 - kept abreast of new ways to use technology, update our websites, and employ various types of social media to appeal to a wide range of ages. They are collaborating with the Vocations Committee to develop the use of social media for the Order.
 - worked toward getting the Essential Documents, recent formation materials and the national newsletter translated into Spanish. Korean translations are underway as well. Another aspect of ‘communications’ is the need to be sensitive to multicultural issues, and providing translators when holding gatherings in Regions with fraternities of different languages.
 - examined our national newsletter, TAU-USA, and the various list-servs used by the National Council to communicate with its members.

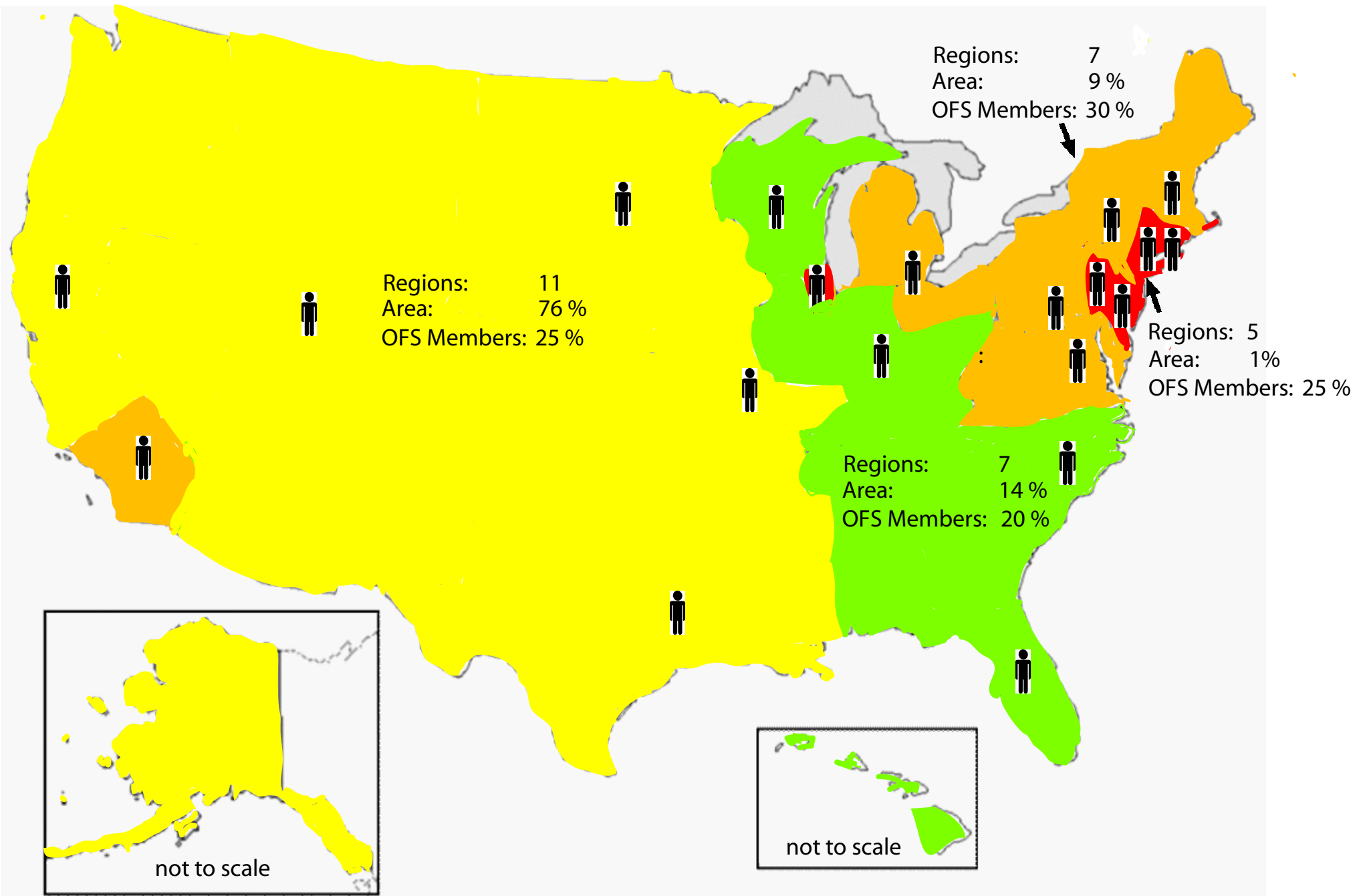
Update: in 2018 we unveiled a new website for the national fraternity.

- **Spiritual Assistant Training for Seculars**---This issue is addressed in part in the section for the Pastoral Visit below. As the numbers of 1st Order and TOR friars decline in the US, other religious and Secular Franciscans will need to be trained for this service. In the 25 Regions reporting, 99 of 462 local fraternities were without a Spiritual Assistant. In 9 of these Regions, all fraternities had S.A.’s; in the other 16, an average of 30 % of local fraternities lacked Spiritual Assistance. The course *Franciscan Family Connections* is supported by CNSA (see question 3. in the section for the Pastoral Visit). Working in collaboration with the Provincial Spiritual Assistants, a number of Regions are bringing together groups of Seculars for group learning and mentoring.
- **Ministry to Youth**---Over the last several years the National Fraternity has experienced repeated changes in direction for our national youth efforts, with little progress being made. Rather than continuing this pattern, this NEC has decided to spend 1-2 years reviewing what we have in place (e.g., documents, programs), exploring new possibilities, and, along with the National Council, discerning a comprehensive plan for the future. Update: in 2017 we held a workshop on the topic of youth, and appointed a new FYYA chair.

NAFRA - USA - Table of Regions

Reg. #	REGION	No. of Fraternities	Professed	Candidates	Total	Density OFS/ 1000 sq. mi.	Approx. Area (sq mi)	Composition
50	OHANA O KE ANUENUE	6	55	13	68	6.22	10,931	Hawaii
51	FIVE FRANCISCAN MARTYRS	36	648	52	700	11.24	62,276	Florida, s Georgia, lower Alabama
52	ST FRANCIS	30	659	48	707	12.27	57,638	s California, up to San Luis Obispo
53	ST JUNIPERO SERRA	28	587	48	635	3.13	202,921	n California, Nevada except Las Vegas
54	TROUBADOURS OF PEACE	10	274	35	309	0.38	815,727	Oregon, Washington, Idaho, Alaska
55	QUEEN OF PEACE	29	473	20	493	1.48	332,831	Minnesota, Iowa, N. & S. Dakota exc. Rapid City area, e 2/3 Nebraska
56	DIVINE MERCY	26	541	50	591	14.60	40,487	lower Michigan, Toledo OH area
57	ST MARGARET OF CORTONA	33	747	120	867	15.87	54,621	Virginia, DC, most of Maryland, s central Pennsylvania, far e W. Virginia
58	ST THOMAS MORE	9	202	39	241	2.03	118,594	Arizona, Nevada around Las Vegas
59	MOTHER CABRINI	18	437	40	477	64.44	7,402	ne Illinois, incl. metro Chicago
60	ST JOAN OF ARC	14	243	20	263	1.74	151,113	Louisiana, Mississippi, far e Texas, far sw Tennessee, s 2/3 Arkansas
61	BRO & SIS OF ST FRANCIS	30	510	87	597	2.78	214,970	N. & S. Carolina, n Georgia (90%), Alabama exc. s part, Tennessee exc. far sw.
63	FRANCISCANS OF THE PRAIRIE	8	210	13	223	6.47	34,491	n 3/4 Illinois exc. ne part around Chicago
64	HOLY TRINITY	16	219	22	241	3.63	66,335	Kentucky, s 1/2 Ohio, se Indiana near Louisville
65	LA VERNA	17	442	20	462	6.54	70,609	Wisconsin, upper Michigan
66	OUR LADY OF INDIANA	15	331	54	385	13.43	28,661	n 3/4 Indiana
67	LOS TRES COMPANEROS	15	255	33	288	1.84	156,739	central Texas
68	LADY POVERTY	25	357	23	380	8.13	46,715	W. Virginia, w 1/2 Pennsylvania, far w Maryland, far e Ohio
69	ST KATHARINE DREXEL	28	687	56	743	43.72	16,996	Delaware, e 1/2 Pennsylvania, s 1/2 New Jersey
70	ST MAXIMILIAN KOLBE	25	411	34	445	21.81	20,400	n 1/2 Ohio
71	ST KATERI TEKAKWITHA	24	419	25	444	11.64	38,128	upstate New York + Erie, PA
72	SANTA MARIA DE LAS MONTANAS	14	167	17	184	0.59	311,231	Colorado, Utah, Wyoming exc. Far nw, sw S. Dakota, w 1/3 Nebraska, nw Kansas
73	OUR LADY OF THE ROCKIES	6	74	11	85	1.54	55,255	Montana, far nw Wyoming
74	ST CLARE	8	200	3	203	2.35	86,505	s 80% Missouri, n 1/3 Arkansas, s 1/4 Illinois, far sw Indiana
75	OUR LADY OF GUADALUPE	15	300	22	322	1.72	187,742	New Mexico, far w Texas, far e Arizona
76	FR SOLANUS CASEY	36	695	42	737	78.60	9,376	Connecticut, Rhode Island, parts of Massachusetts, New York, & e Pennsylvania
77	OUR LADY OF THE ANGELS	34	762	39	801	201.10	3,983	n 1/2 New Jersey, Staten Island & Manhattan, s Westchester Co.
78	ST ELIZABETH OF HUNGARY	27	581	37	618	10.08	61,308	Vermont, New Hampshire, Maine, e 2/3 Massachusetts, far ne New York
79	THE TAU CROSS	28	553	30	583	404.02	1,443	New York counties on Long Island & the Bronx
80	JUAN DE PADILLA	15	205	23	228	1.52	150,404	Oklahoma, Kansas + Kansas City, MO
TOTALS		625	12,244	1,076	13,320		3,531,905	

Demographic Map of the National Fraternity of the Secular Franciscan Order— USA



**SECULAR FRANCISCAN ORDER (OFS)
2017 GENERAL CHAPTER
INSTRUMENTUM LABORIS**

How should an Order like the OFS be managed at all its levels?

BACKGROUND

During the 2014 General Chapter, capitulars reflected on the theme “How should an Order like the Secular Franciscan Order (OFS) be managed at all its levels”, and were encouraged to lead a reflection within their respective national fraternities with all professed brothers and sisters in the OFS and Franciscan Youth during the following three years (2014-2017). Each national fraternity was to adopt a suitable method for this reflection, including the participation of its local and regional fraternities as it deemed appropriate, and was to collect the most workable and significant proposals along with the corresponding motivations. Questions were provided to assist in this reflection on the strengths, weaknesses and priorities of their respective national fraternities, as well as the strengths and challenges in the management of the OFS at the international level. However, the submission from each national fraternity was to focus on **identifying three priorities for the improvement of the management of the Order at the international level, and to present specific proposals to address each of these priorities.**

By June 2016, the deadline for receiving input from national fraternities, proposals had been received from 45 national fraternities¹. A number of other national fraternities also engaged in this reflection but their input was not received by the deadline and, as a result, is not reflected in this document. It should be noted that the response by national fraternities to this initiative has been one of the most extensive responses to any issue in the history of the International Council of the OFS (CIOFS).

To review these proposals, an Adhoc Commission was appointed by the CIOFS Presidency to integrate the most significant proposals into an *Instrumentum Laboris* which would be sent to all national fraternities for their study in preparation for the 2017 General Chapter. At this chapter, each of the concrete proposals contained in the *Instrumentum Laboris* will be presented to the capitulars for discussion and decision-making. The Commission was composed of Maria Consuelo De Nunez (Venezuela, chair), Doug Clorey (Canada), Marion Clorey (Canada), Attilio Galimberti (Italy), Ghislain Knepper (France), and Mary Stronach (USA). Members of the Adhoc Commission reviewed all of the suggestions received and synthesized these into 8 priority areas, each with concrete proposals for change.

¹ Angola, Argentina, Austria, Belgium, Burkina Faso, Canada, Chile, Costa Rica, Croatia, Cuba, Czech Republic, Denmark, Ecuador, El Salvador, France, Germany, Great Britain, Guatemala, Guinea Bissau, Honduras, Hungary, Ireland, Italy, Korea, Lithuania, Madagascar, Mauritius, Mexico, Mozambique, Netherlands, New Zealand, Oceania, Paraguay, Peru, Puerto Rico, Slovakia, Slovenia, South Africa, Sweden, Switzerland (German speaking), Togo, Ukraine, USA, Venezuela, Vietnam

CONTEXT

The purpose of the *Instrumentum Laboris* is to synthesize the priorities and specific proposals submitted by the national fraternities for the improvement of the management of the Order at the international level. While

Circ. N. 7/14-20 suggests that national fraternities reflect on their strengths and weaknesses, and identify priorities for their individual national fraternities, only proposals related to the management of the OFS at the international level have been requested. It is also important to ensure that the principle of subsidiarity is respected in dealing with the area of managing national and regional fraternities, each having their own diversity and uniquenesses.

The focus of the *Instrumentum Laboris* is on the management of the international fraternity. However, as Secular Franciscans, we must remember that our commitment, through profession, is to the entire Order; that is, to all levels of fraternity ... local, regional, national and international. In the formula of profession, we promise “to live all the days of our lives in the Secular Franciscan Order by observing its Rule of life”. And, in Article 20 of our Rule, the Secular Franciscan Order is described as having four levels – local, regional, national and international – each having its own moral personality in the Church. This means that, at the same time, Secular Franciscans belong to their respective local, regional, national and international fraternities. Unlike hierarchical structures, the structure within the Secular Franciscan Order does not allow for “we” and “they” perspectives (for example, “we” at the local level, and “they” at the international level). We are all one and, when we speak of the international level, we include all Secular Franciscans. It is important to recognize this aspect in our reflection so that there is no misunderstanding of who is responsible for improving the management of the OFS at the international level. We all are ... every Secular Franciscan.

As a result, the *Instrumentum Laboris* is being forwarded to all national fraternities for their further reflection. Firstly, it is being sent to affirm and respect the contribution that each national fraternity has already made to this reflection. Secondly, it is being sent so that national fraternities can review the priorities and concrete proposals that have surfaced through this reflection. National fraternities, through whichever means they deem appropriate within their respective realities, will need to determine which of the proposals they are prepared to support, and what resources, financial and human, they are prepared to offer to implement these proposals. With this information, strategies will then be developed to implement each of the proposals chosen. It must be clearly stated that it is not the responsibility of the International Presidency to implement any of these proposals on their own and with existing resources; only with the infusion of sufficient resources from the national fraternities can these proposals be implemented. It can also be said that an underlying theme of all proposals in the document is to create a better sharing of the work on the international level with all members of the Order who have the relevant competencies – elected and non-elected. During the 2017 General Chapter, International Councillors from the various national fraternities will bring the views of their respective national fraternities to the General Chapter and come prepared to make decisions on behalf of the entire Secular Franciscan Order.

MANAGEMENT OF THE ORDER

Over the centuries, the Secular Franciscan Order has adapted to the times, passing from a fragmented organization to a unified and centralized organization. Although much progress has been made, some challenges remain to be addressed by the OFS in its growth as a unique Order within the Church. Many of these challenges have been identified over the years by the International Presidency, by national fraternities during the course of visits and chapters and, more recently, by capitulars of the 2014 General Chapter during their reflections on how to better manage the OFS. In general, these challenges can be categorized into three broad categories:

- understanding the nature of the Order (objectives),
- establishing an organizational structure that will allow it to operate in conformity with its nature (organization), and
- developing modalities for choosing leaders who are available and capable (people).

These three categories – objectives, organization and people – represent the essential elements that are considered when assessing the management of any organization.

From its very beginning, the Secular Franciscan Order has been known as an Order of “penitents”; however, there is not always a good understanding of the Order’s nature and identity, including the commitment by its members to conversion and to reaching out to others. This has been the subject of several General Chapters and always results in emphasizing the need for formation as a top priority of the Order.

It should also be noted that the life of Secular Franciscans is lived within the context of a local fraternity and that local fraternities are grouped within a regional, national and international structure (GC, Art. 29). It is clear that one of the unique aspects of the Secular Franciscan Order, as a secular Order, is its immersion in the world; its members live in the ordinary conditions of the world and within the context of their families, work places and society at large. Because of this uniqueness, some of the organizational models that have been utilized within the OFS have not been effective, especially those models that have been specifically designed to meet the needs of religious communities. The lack of permanent structures has also contributed to instability in supporting the functioning of the Order and its activities.

The life of fraternities is also influenced by the quality of its leadership. Regrettably, the OFS often experiences a lack of prepared and available persons to lead the fraternity at all its levels, often exacerbated by the lack of adequate training for leadership offices, and by the inherent time challenges faced by Secular Franciscans in making themselves available to serve the fraternity while living a secular way of life with a multitude of family and occupational responsibilities. The lack of involvement by non-elected members of the fraternity who are experienced and skilled also contributes to the imbalance and uneven distribution of workload within the fraternity, often leading to the physical and mental exhaustion of those who serve. In addition, there is often a lack of continuity between those leaving and those entering offices in the fraternity, and the sharing of experience between both.

Another management challenge is the insufficient attention paid to communication and to the establishment of effective relationships with other fraternities and organizations. And, all of these challenges are further complicated by the lack of financial resources, at all levels of fraternity, which constrains the implementation of improvements within the Order.

PRIORITIES AND PROPOSALS

In reviewing the submissions from national fraternities, the following priority areas have been identified:

- 1 Formation
- 2 Fraternal Life
- 3 Building a Fraternal and Evangelical World
- 4 Leadership
- 5 Communications
- 6 Finance
- 7 Spiritual Assistance
- 8 Franciscan Youth

For each of these priority areas, concrete proposals have also been put forward. The following sections of the document present the priority areas and their respective concrete proposals.

1. FORMATION

Formation can be defined as the action of forming or process of being formed. Within the context of the Secular Franciscan Order, the formation process aims to foster human, Christian and Franciscan maturity so as to be able to live a full Gospel life in the manner of St. Francis of Assisi. By its very nature, formation is a life-long process which aims to sustain the witness and commitment of Secular Franciscans in the world (GC, Art. 50.1).

Formation continues to be the Order's top priority and "plays an essential role in both conversion to Christ and deepening our Secular Franciscan vocation. The lack of authentic conversion is, by far, one of the most serious problems we are confronted within our Order ... formation, both initial and ongoing, should be accessible to everyone, and national fraternities should engage in this uppermost priority." (Conclusions of the 2014 General Chapter). While an enormous amount of energy has been expended on creating formation materials and offering formation courses (especially to formators), there has been an overall lack of continuity in the Order's efforts, plagued by the lack of resources, both human and financial. To address these challenges, the following concrete proposals are presented:

Proposal 1 – OFS International Office of Formation

It is proposed that a permanent International Office of OFS Formation be established which would be staffed with personnel skilled in responding to the formation needs of the Order. This office would be responsible for:

- coordinating the work of both initial and ongoing formation at an international level so as to deepen the Secular Franciscan's sense of belonging to the OFS and identity so that the Order can fully undertake its mission in the world;

- developing a library of resources on a variety of subjects that would support the formation process, resources that would be available both online and in hardcopy; national fraternities could then develop their own programs of initial and ongoing formation, based on their own specific and unique realities, using the library of resources to support their programs (focus by this office would be less on creating programs and more on creating a variety of resources that could be used by national fraternities to create their own programs);

- exploring and developing the most modern of methodologies that could be used to make formation resources more accessible and dynamic (for example, the use of online courses and webinars);

- assisting in formation conferences / workshops, held in conjunction with national or General Chapters or with continental gatherings and congresses; and

- exploring other sources of Franciscan formation and collaborating with like-minded organizations so as to leverage expertise both within and outside the OFS.

It should be noted that the need for a formation manual for candidates has also been underlined in the submissions from national fraternities; however, these would be better constructed by national fraternities based on the specific programs that they eventually create and that would be adapted to their specific needs and circumstances.

2. FRATERNAL LIFE

The local fraternity is "the basic unit of the whole Order" and "the privileged place for developing a sense of Church and the Franciscan vocation and for enlivening the apostolic life of its members (Rule, Art. 22). All of the other structures of the Order, whether regional, national or international, should aim to support the life of the local fraternity and the fraternal life of the brothers and sisters. National fraternities have repeatedly underlined that the focus of managing the Order must be on the animation and guidance of local fraternities but, regrettably, the life of the local fraternity is often lost in the governance of the Order. The regional, national and international levels of the Order are meant to support the animation and guidance of the life of the local fraternity but, often, become a burden that achieves little. Each level carries with it a significant commitment of time and resources (people and finances) which often translates into few benefits for the members of the local fraternity.

On a global scale, the physical size of some countries, the distances involved in travelling within and between countries, the cultural differences within and between countries, the variety of languages and dialects used, and the political environment in which life is lived by Secular Franciscans are all significant challenges in managing an Order like the OFS. Although all Secular Franciscans belong to the same Order, the way in which their lives are lived varies greatly. A more decentralized structure is necessary that

accommodates for these differences and the challenges that they present. As Pope Francis states in his encyclical “*Evangelii Gaudium*”, there is a “need to promote a sound ‘decentralization’ ” (*Evangelii Gaudium*, 16). He also states that “excessive centralization, rather than proving helpful, complicates the Church’s life and her missionary outreach” (*Evangelii Gaudium*, 32).

Proposal 2 – Creating a Decentralized Structure for the OFS

It is proposed that a review be undertaken of the structures of the Secular Franciscan Order as outlined in the General Constitutions, with an openness to modifying the General Constitutions, where necessary, to create a more decentralized structure that reflects the secular nature of the Secular Franciscan Order and its members. Along with creating a more decentralized structure, a more flexible governance structure should be adopted for the Order that focuses specifically on animating and guiding the local fraternity.

The following are some of the practical consequences that could result from adopting a more decentralized structure at the international level:

- creating a structure that has fewer levels of bureaucracy and that simplifies the life of the Order and its outreach to those in need;

- creating permanent structures at the international level that support a decentralized manner of operating and offer continuity in supporting the life of the local fraternity and the fraternal life of the brothers and sisters;

- grouping national fraternities from within the same geographic area, and organizing international gatherings that bring these national fraternities together periodically;

- reaffirming the need for fraternal and pastoral visits as an essential element of animating and guiding the Order;

- developing a strategy around fraternal and pastoral visits that focuses on national fraternities that require support and ensuring that there is a continuity in this support provided, rather than focusing on the legislative requirements to preside at national chapters every three years and to conduct fraternal and pastoral visits every six years;

- delegating visitors to national fraternities who are skilled and experienced Secular Franciscans from neighboring national fraternities (also delegating presiders at national elective chapters from neighboring national fraternities);

- identifying specific areas of the international fraternity that require specific support as a result of their unique and challenging circumstances (eg. China Project, Africa Project)

- providing practical support to brothers and sisters, not only spiritually, but also materially for those experiencing difficult circumstances; and

- developing guidelines and procedures for the twinning of fraternities at all levels – national, regional and local.

3. BUILDING A FRATERNAL AND EVANGELICAL WORLD

The Rule of the Secular Franciscan Order calls Secular Franciscans to observe the Gospel of our Lord Jesus Christ by following the example of St. Francis of Assisi, who made Christ the inspiration and the centre of his life with God and people (Rule, Art. 4). Similar to the life of St. Francis himself, the life of Secular Franciscans tends to oscillate between developing an internal spiritual life while also developing an external life which reaches out to others with concrete actions. Secular Franciscans do not live their lives for themselves, but rather live it in an outwardly direction towards people in need. The OFS Rule is clear on this point. “Secular Franciscans, together with all people of good will, are called to build a more fraternal and evangelical world so that the kingdom of God may be brought about more effectively” (Rule, Art. 14). Individually and collectively, Secular Franciscans are to be in the forefront in promoting justice by the testimony of their human lives and their courageous initiatives (Rule, Art. 15). In this regard, initiatives that promote justice, peace-making and care of creation are central to living out the Franciscan charism. For this reason, fraternal life should include a specific focus on JPIC (Justice, Peace and Integrity of Creation) and its works.

However, while concrete actions in the area of justice, peace and integrity of creation are essential, developing an internal disposition through prayer is also a prerequisite to any initiatives that are directed towards building a more fraternal and evangelical world. “As Jesus was the true worshipper of the Father, so let prayer and contemplation be the soul of all they are and do” (Rule, Art. 8).

Proposal 3a – OFS International Secretariat for JPIC

It is proposed that a permanent International Secretariat for Justice, Peace and Integrity of Creation (JPIC) be created within the OFS which would be staffed with personnel skilled in this domain. This Secretariat would be responsible for:

- coordinating JPIC activities within the OFS, and working closely with other JPIC organizations within the Franciscan Family; for example, the Inter-Franciscan Commission for Justice and Peace (Romans VI) and Franciscans International (in conformity with the Statutes of the International Fraternity of the Secular Franciscan Order, a member of the Presidency would support the work of this Secretariat in the field of justice, peace and integrity of creation);

- monitoring international issues of particular interest to the OFS and providing responses to these international issues; examples could include issues around refugees and immigrants, wars and conflicts, and environment and climate change (with over 300,000 members worldwide, the OFS has the possibility of exerting significant leverage to advocate for justice, peace and integrity of creation);

- initiating JPIC projects in which all members of the OFS could participate, thereby linking the work of the OFS world-wide; combating illiteracy among vulnerable populations including women and children in rural areas could be one of the organization’s outreach priorities; and

- acting as a focal point for the OFS during natural disasters and coordinating disaster assistance with the appropriate agencies, directed to both Secular Franciscan and others in the affected areas.

Proposal 3b – Praying Together

It is proposed that the work of JPIC be complemented by regular calls for intercessory prayers across the OFS in support of specific outreach activities. These requests for prayer would provide a basis for engaging fraternities in praying together with the OFS worldwide.

4. LEADERSHIP

The international fraternity is guided and animated by the International Council of the OFS (CIOFS) with its seat in Rome (Italy), by its Presidency and by the General Minister (GC, Art. 69.2). The International Council, convened in General Chapter, is the highest governing body of the OFS with legislative, deliberative and elective powers (GC, Art. 70.3). The Presidency of the International Council of the OFS is constituted within the International Council, of which it forms an integral part (GC, Art. 70.2), and is responsible for coordinating animating and guiding the OFS at the international level (GC, Art. 73 (b)). The leadership of the OFS therefore rests with the International Council and, on a day-to-day basis, with the International Presidency. It is essential that communications between the International Presidency and the International Councillors be regular and effective.

The following proposals are therefore directed to the International Council and Presidency.

Proposal 4a – Membership

In order to properly manage and lead an organization, it is essential to understand its membership. It is proposed that a concerted effort be made to collect information on membership in the OFS, including demographic data. An international registry of all permanently professed members of the OFS would be the heart of such information. Already, some national fraternities have developed such registries. As a minimum, an online directory of all local fraternities within the International Fraternity should be established with a specific email contact for each local fraternity. Ultimately, all communications from the International Presidency could be directed to this specific contact within each local fraternity, with a copy to the International Councillor. Collecting this kind of information would also enhance the linkages between local

fraternities and the international body, create a network to connect different levels of fraternity and enhance the overall sense of belonging within the OFS.

Proposal 4b – Training Leaders

It is also proposed that materials suitable for the training of leaders be developed (Minister, Vice-Minister, Secretary, Treasurer, Formator, JPIC Co-ordinator, Youth Co-ordinator, International Councillor). These materials should be made available electronically (online) and in hardcopy, and could be used by national and regional fraternities to properly train leaders.

Proposal 4c – Creating Pool of Expertise

It is also proposed that a pool of Secular Franciscans who have acquired extensive experience in serving the OFS be created and utilized. To-date, the work of managing the OFS at the international level has been too centralized and limited to only a few people. It is time to utilize the expertise of Secular Franciscans across the world in supporting the operation and management of the Order. The engagement of non-elected members of the OFS in its operation and management is key to being able to better manage an Order such as the OFS. These skilled resources could be retained to:

- work in some of the permanent offices that are being proposed in this Conclusive Document;
- preside at national elective chapters, conduct fraternal visits and perform various studies and projects of interest to the OFS; and
- provide support to national councils in resolving problems at the national level.

Proposal 4d – Collaboration within Franciscan Family

The Secular Franciscan Order is part of the broader Franciscan Family, one among many spiritual families in the Church who recognize that they are all called to follow Christ in the footsteps of St. Francis of Assisi (Rule, Art. 1). The above proposals are directed primarily to leadership within the OFS. To be effective leaders, however, there must also be ongoing and regular communications with the rest of the Franciscan Family. On a day-to-day basis, this is a fundamental responsibility of the International Presidency. Participation in dialogue with the Conference of the Franciscan Family (CFF) and coordinating actions and activities with the Conference are required in order to support our membership in the broader family. It is proposed that common initiatives with the Franciscan Family be identified and pursued so as to increase the level of cooperation.

Proposal 4e – Administration and Promotion

To support the efficient administration and promotion of the OFS, the following practical tasks and actions are proposed:

- developing and distributing a template for annual reports submitted at various levels of fraternity;
 - assembling activity reports from national fraternities and making them available (online);
 - providing clear direction and expectations to national councils when conducting fraternal and pastoral visits;
 - developing a more efficient and timely process for revising / approving National Statutes;
 - developing protocols and procedures for handling appeals and petitions from national fraternities;
- and
- developing guidelines for vocational promotion across the OFS, including the possibility of organizing a world-wide “Secular Franciscan Day” to promote the OFS and make the Secular Franciscan vocation known.

5. COMMUNICATIONS

Communications plays a critical role in all facets of an organization, both communications within the organization (internal) as well as communications outside of the organization (external). Effective communications are essential to building and maintaining relationships within the organization, establishing effective teams, facilitating innovation, contributing to the growth of the organization and ensuring

transparency and sense of trust in the organization.

Proposal 5 – OFS International Office of Communications

It is proposed that a permanent International Office of Communication be established and staffed with professionals possessing the requisite skills in communications, website management and publishing. In some cases, the office may have to retain professional staff on a contractual basis to ensure quality work. This Secretariat would be responsible for:

- developing an international communication strategy for the OFS;
- performing media relations and issuing News Releases on specific events providing the OFS with a common voice that reflects its Franciscan vocation and mission (e.g. refugee crisis, natural disasters, etc.);
- managing the CIOFS website and social media;
- developing promotional material for the OFS (eg. posters, flyers, videos, etc.);
- publishing an international newspaper (electronic and hardcopy); and
- creating and maintaining a database of international and national contacts.

An essential part of the work of this office would be to determine the best tools for communicating with the OFS, given the diversity of its membership and availability of technology.

6. FINANCES

In conformity with the Statutes of the International Fraternity of the Secular Franciscan Order, the Presidency of the International Council appoints a Treasurer and establishes a Finance Commission responsible for the financial and patrimonial management of the International Fraternity. The presence of a Treasurer and Finance Commission is essential to the effective and efficient financial management of the Secular Franciscan Order at the international level, and is endorsed by national fraternities. However, to ensure a greater transparency the following are also recommended:

Proposal 6 – Financial Strategy and Plan

It is proposed that the International Council develop a financial strategy and plan for the international fraternity which includes both revenue generation strategies and expenditure management controls; the financial strategy would strive to balance the distributions of financial resources between administrative/management requirements and outreach initiatives to national fraternities in need. It is further proposed that this financial strategy and plan be presented and approved by the Order's General Chapter.

The following practical tasks would form part of the work of developing a financial strategy and plan:

- creating, in collaboration with the Office of Formation, a training module that explains article 25 of the OFS Rule, the responsibilities of each member of the Order, the coresponsibilities of each level of fraternity, the inequities of financial resources across the Order and the procedures to use when managing fixed assets/patrimony;
- explaining and stressing the importance of being accountable for financial decisions taken by the chapters of higher level fraternities (regional, national and international) and ensuring that International Councillors, along with their respective National Councils, assume the responsibility for implementing decisions taken at General Chapters regarding the finances of the Order;
- developing an approach to revenue generation that includes not only contributions from national fraternities but also donations, bequests and specific fundraising projects for specific initiatives; new sources of funding should be sought from foundations, benefactors and businesses (consideration should be given to retaining a professional fundraising company to raise funds for the OFS);
- developing an approach to travel that focuses on essential travel, decentralization of resources and minimizing the carbon footprint of the OFS; this approach would include specific criteria that ensures appropriateness of all expenditures associated with travelling to national fraternities for chapters and visits and pays special attention to fraternities with limited financial means; and
- providing detailed financial reports to national fraternities on a regular basis (at least quarterly) so as

to engage the international fraternity as a whole in the sustainable financial management of the Order.

7. SPIRITUAL ASSISTANCE

In their reflection, national fraternities acknowledged and expressed their appreciation for the generous service provided by spiritual assistants to both the Secular Franciscan Order and to the Franciscan Youth (YouFra) spread out across the world. However, in managing the OFS, it was also acknowledged that the spiritual and pastoral care of the Secular Franciscan Order is entrusted by the Church to the Franciscan First Order and the Third Order Regular (TOR) and that this duty is exercised by their General and Provincial Ministers. It is these Franciscan Major Superiors who are responsible for the quality of spiritual assistance and pastoral care, and for the specific preparation of the Assistants so that they will be suitable and well-prepared (Statutes for Spiritual and Pastoral Assistance to the Secular Franciscan Order, Art. 5).

It should be noted, however, that the OFS is interested, willing and available to assist the Major Superiors in supporting spiritual assistants in exercising their duties and responsibilities. This would include participation in formation courses for newly appointed spiritual assistants, and the overall training of spiritual assistants regarding their service to the OFS.

Major Superiors are also encouraged to include their responsibility to the OFS in the formation programs of their friars and the responsibility of the First Order and Third Order Regular to engage with the OFS as an integral component of the Franciscan Family.

National fraternities also pointed out the need for better connections between the General Spiritual Assistants and the National Spiritual Assistants, especially through the creation and distribution of circulars that support and encourage spiritual assistants in their respective ministries.

8. FRANCISCAN YOUTH (YOUFRA)

The Secular Franciscan Order is called to share its experience of evangelical life with youth who feel attracted to St. Francis of Assisi and considers itself to be particularly responsible for the Franciscan Youth. (GC, Art. 96).

Essential to the commitment of the OFS to Franciscan Youth is the development of a relationship between Secular Franciscans and members of the Franciscan Youth, and their respective fraternities. It is recognized that the development of relationships requires a willingness on the part of both parties to spend time together, and to share vocational journeys with each other.

In its reflection, national fraternities acknowledged the richness of YouFra documents that are already available to support the establishment, formation and guidance of Franciscan Youth, including:

- YouFra – A Way of Franciscan Vocation
- YouFra Formation Program
- Sample Draft of YouFra National Statutes
- YouFra International Regulations
- Conclusion of the 1st YouFra International Assembly – Spain 2007
- Incorporation of the YouFra members into the OFS
- Guidelines for Fraternal Animation
- Guide for the Establishment of a New Fraternity of Franciscan Youth (YouFra)
- Conclusions of the 2nd YouFra International Assembly (Croatia, 2014)
- Celebrations in the Fraternity of the Franciscan Youth

It is important for fraternities to realize that today's YouFra is different from the YouFra of the past. The

above documents are helpful aids in understanding the nature of YouFra and how best to work with Franciscan Youth.

Proposal 8 – Engagement with Franciscan Youth

It is proposed that greater strides be made by the Secular Franciscan Order in sharing its experience of evangelical life with youth by:

developing a formation module for use by Secular Franciscans that would outline the call of the OFS to share its experience of evangelical life with youth and its overall responsibility for Franciscan Youth;
encouraging local fraternities to reach out to youth who may be seeking an experience of evangelical life in the manner of St. Francis (all available technological means should be employed in reaching out to young people, including social media, blogs, etc.);

- organizing special activities for young people, and even children, in order to share its experience with them and to promote the creation of YouFra fraternities in their localities;
- organizing joint gatherings, activities and events in those areas where there are YouFra fraternities so as to provide opportunities for getting to know one another better and, through these activities, strengthen their awareness of belonging to the whole Franciscan Family; and
- exploring opportunities to collaborate with YouFra members in areas of responsibility in which they have a particular competence; for example, development of websites and engagement in social networks).

While some may think of Franciscan Youth as the “future” of the Franciscan Family and the Franciscan charism, the Secular Franciscan International Presidency has been reminded on many occasions that Franciscan Youth is part of our “present” reality and that the OFS must continually seek opportunities to work with YouFra as one of its particular ministries.

IN CONCLUSION

The reflection of national fraternities on how an Order like the Secular Franciscan Order (OFS) should be managed at all its levels has resulted in the identification of eight priority areas and, for each of these priority areas, concrete proposals to support a more efficient and effective management of the Order. Each of these concrete proposals associated with formation, fraternal life, building a fraternal and evangelical world, leadership, communications, finance, spiritual assistance and Franciscan Youth could contribute to a strong renewal of the way in which fraternities are animated and guided. These proposals could be instrumental in giving life and breath (“anima”) to the structures of the OFS and, together, guide the Order forward with concrete actions to build a more fraternal and evangelical world.

As the Order prepares to celebrate the 40th anniversary of Pauline Rule of 1978 (*Seraphicum Patriarcha*), it is opportune to reflect on the application of the Rule and how it is to be lived by Secular Franciscans. Let us be well prepared to go out into the world following Christ in the footsteps of St. Francis and St. Clare.



ORDO FRANCISCANUS SAECULARIS
XIV General Chapter
VI General Elective Chapter

HOW SHOULD AN ORDER LIKE THE OFS BE MANAGED AT ALL ITS LEVELS?

**OFS: A UNIQUE RELIGIOUS ENTITY
IN THE CHURCH**

Reflection on the **identity** and **nature** of the OFS

SUMMARY

1. WHY IS IT ESSENTIAL TO ADDRESS THIS THEME?
2. NATURE AND IDENTITY OF THE ORDER
3. FUNDAMENTAL PROBLEMS
4. OBJECTIVES AND SCOPE OF MANAGEMENT
5. SOME CONCRETE PROBLEMS
6. SOME POSSIBLE PROPOSALS
7. PROJECT FOR THE NEXT TRIENNIUM.

1. WHY DO WE HAVE TO ADDRESS THIS THEME?

Page 1

- WE HAVE NEVER BEEN A CENTRALIZED ORDER.
- TO CREATE A TRUE AND EFFICACIOUS SENSE OF UNITY AND OF BELONGING AFTER 5 CENTURIES OF FRAGMENTATION
- IDENTITY AND NATURE OF THE OFS: MOSTLY UNKNOWN!
- EXERCISE OF RESPONSIBILITY: OFTEN DISTORTED
- ORGANIZATION OF FRATERNITIES AT VARIOUS LEVELS
- MODELS OF MANAGEMENT AND SERVICE: NONE OF THE EXISTING ONES IS SUITABLE FOR US. WE ARE UNIQUE.

2. NATURE OF THE ORDER

Page 3

- A. THE FRANCISCAN FAMILY AND THE OFS ACCORDING TO THE PROJECT THAT GOD INSPIRED TO FRANCIS.
- B. UNITY OF THE OFS: ORGANIC UNION
- C. ORDER OF BROTHERS AND SISTERS AND COLLEGIALLY
- D. SUBSIDIARITY AND NEED TO BE "ORDER" AN NOT ANARCHY OR DIS-ORDER
- E. FULL TIME SECULAR FRANCISCANS
- F. RECONCILE A FULL SECULAR LIFE WITH ALL THE OTHER RESPONSIBILITIES IN THE ORDER.

3. FUNDAMENTAL PROBLEMS

Page 9

which prevent the order to fully develop into what it should be.

- LACK OF UNDERSTANDING AND AWARENESS OF THE COMMITMENTS MADE WITH OUR PROFESSION.
- LACK OF COMMITMENT, OF MANY PROFESSED MEMBERS, TO ENTER INTO A SERIOUS CONVERSION JOURNEY.

- SUBSTANTIAL IGNORANCE OF THE SACRED SCRIPTURES, THE WRITINGS OF SAINT FRANCIS, THE ESSENTIAL TEXTS OF FRANCISCAN SPIRITUALITY, THE OFS RULE, THE GENERAL CONSTITUTIONS, THE RITUAL.
- ABSENCE AND/OR LACK OF IMPLEMENTATION OF ORGANIZATIONAL STRUCTURES AND PROJECTS OF THE ORDER, CONSISTENT WITH ITS NATURE.

4. OBJECTIVES AND SCOPE OF “MANAGEMENT”

Page 11

- **TO KNOW WELL THE OBJECTIVES.**
- **TO HAVE A PROJECT AND PREDISPOSE IN ADVANCE THE ACTIONS AND THE ORGANIZATION TO IMPLEMENT IT.**
- **CHOOSE THE RIGHT PEOPLE TO ANIMATE AND GUIDE THE FRATERNITY.**
- **INSTITUTIONS, STRUCTURES AND PROJECTS MUST NOT STIFLE THE MOTIONS OF THE SPIRIT.**
- **IMPLEMENT THE NECESSARY INSTRUMENTS OF SELF-DETERMINATION AND PERSONALIZATION.**

5. SOME CONCRETE PROBLEMS

Page 13

- LACK OF COLLEGIALITY AND AUTOCRACY OF THE MINISTERS
- CHRONIC LACK OF FINANCIAL RESOURCES
- EXHAUSTING WORKLOADS ON TOO FEW PEOPLE
- NO SUFFICIENT INVOLVEMENT OF NON ELECTED MEMBERS.
- LACK OF PERMANENT STRUCTURES TO SUPPORT THE ESSENTIAL FUNCTIONS OF THE ORDER WHICH DEMAND A NECESSARY CONSISTENCY AND CONTINUITY.
- LACK OF WELL PREPARED AND AVAILABLE PERSONS.
- LACK OF FORMATION TO GUIDE AND ANIMATE FOR THE ELECTED FRATERNITY LEADERS AND TO FORM PROSPECTIVE FRATERNITY LEADERS.
- INSUFFICIENT FRATERNAL AND PASTORAL VISITS AND ACCOMPANIMENT OF FRATERNITIES
- INSUFFICIENT INVOLVEMENT IN THE STRUCTURES AND DYNAMICS OF LOCAL CHURCHES AND OF THE UNIVERSAL CHURCH.
- INSUFFICIENT INTERACTION AND COMPREHENSIVE COLLABORATION WITH THE REST OF THE FRANCISCAN FAMILY.
- LACK OF VERTICAL AND HORIZONTAL COMMUNICATION.
- LACK OF UNDERSTANDING OF THE NATURE OF THE OFS-YOUFRA RELATIONSHIP. LACK OF INTERACTION AND RESPONSIBILITY WITH RESPECT TO YOUFRA.

6. SOME POSSIBLE PROPOSALS

Page 17

- A. CREATION OF PERMANENT STRUCTURES

- B. SUFFICIENT AND CONSTANT FUNDING: SOME PROPOSALS.
- C. PROGRAMMING, WORKING METHODS & TIMINGS MATCHING THE ACTUAL HUMAN AND FINANCIAL RESOURCES. PRIORITIZATION
- D. UNIFY NAMES AND FUNCTIONS IN THE ORDER FOR EQUIVALENT STRUCTURES
 - Local Fraternity
 - Higher-level Fraternities: representative and executive organs
 - Correct interpretation of “junta”.
- E. VALORIZATION AND PREVAILING IMPORTANCE OF THE SPIRITUAL ASPECT IN THE WORK OF THE ASSISTANTS.
- F. ENFORCEMENT OF THE MANDATORY DUTIES CONTAINED IN THE GENERAL CONSTITUTIONS.

7. PROJECT FOR THE NEXT TRIENNIUM.

Page 23

HOW SHOULD AN ORDER LIKE THE OFS BE MANAGED, AT ALL ITS LEVELS?

OFS: A UNIQUE RELIGIOUS ENTITY IN THE CHURCH REFLECTION ON THE IDENTITY AND NATURE OF THE OFS.

INTRODUCTION

From the time of the promulgation of the Pauline Rule until now, the Secular Franciscan Order has been confronted with many urgent and important problems:

- **The unification of the Order**, which required years of tough commitment and absorbed the greatest part of the energy of the leaders of the Order,
- Juridical **codification of the OFS own Law**, General Constitutions, International and National Statutes, etc. and its enforcement,
- The effort to **amalgamate**, to give a common base and a **sense of belonging** to the thousands of Fraternities scattered in the whole world,
- **Integration into the various organisms** of the Franciscan Family, of the Church and into several other areas,
- **Daily management** of the complex life and events of the International Fraternity (Chapters, Fraternal and Pastoral Visits, Congresses, Formation Courses etc...)

For these reasons, there has been no time to perform an **in depth, internal, shared and personalized reflection on how the Order has to be managed**, in full respect of its identity and secularity, an Order that is present in 115 countries and counts almost a half million members, including the Franciscan Youth.

1. WHY IS IT ESSENTIAL TO URGENTLY ADDRESS THIS THEME?

First of all, because the OFS has **never been an Order organized with a centralized structure**.

Because the Order was divided in four fractions and they lived as separate entities during five centuries, and until today we still experience problems on how the sense of unity and belonging in the Order is actually perceived.

Because the Order has not yet found the **right models of organization, management and service of all Fraternities at all levels**.

Because there are vast areas in which dependence on the religious is still strong, either because secular Franciscans are not yet capable of assuming their responsibilities, or because in some areas persists the conviction in a number of religious that the OFS must be directed by the religious.

Since the promulgation of the Pauline Rule, the Order has made enormous progresses, passing from a 5 centuries consolidated fragmentation to an accomplished *unity*, and yet ... the Order still has some difficulty in **understanding**, among other things,

- *What the Order really is: its IDENTITY AND NATURE*
- *How it should be organized and how it must function,*
- *How roles of responsibility and guide have to be implemented.*

The OFS is an Order in the full sense of the word, a “True Order”¹, even though this reality is often pronounced but rarely understood.

WE FORM A TRUE “SECULAR” ORDER, truly immersed in the world, concretely living in the ordinary conditions of the world.

It is impossible to look back in our own history to find adequate models.

In fact, even at the time of our full autonomy (1215-1471), despite all the efforts of our predecessors, the **Order never obtained the permission to organize itself as a centralized Order**. Then, from 1471 to 1978, the Order lived as an appendage of the Franciscan male religious Orders under whose control the Order lived, without any kind of coordination or centralization of its own.

Only in 1978, the Order was recognized, for the first time in history, as a unified, autonomous and centralized Order and only since the 90ies did we start to speak in terms of concrete centralized and operational unity.

**WE FIND OURSELVES, THEREFORE, IN AN ENTIRELY NEW ENVIRONMENT
AND WITHOUT ANY PRIOR MODEL OF OUR OWN.**

MODELS OF FRATERNITY

Due to the lack of internal reflection on what the OFS really is, we still operate, by and large, according to **the model of the Local Fraternity**, applying largely the same schemes, procedures and errors also to the Fraternities of higher level, including the International level.

One of the most visible consequences of this, is that the **distribution of workload** is almost everywhere strongly **concentrated** (often times in a pathological manner), giving rise to unnatural **accumulations of responsibility**, at times of “**power**” rather than of authority understood as service.

Those who are elected in the National (and regional) *executive*² Councils are the ones who (most of the times no more than 2 or 3 people) individually take upon themselves the whole workload. This happens because frequently no persons of good will make themselves available, or because some (apparently too many) love to feel important and want to dominate the others, or simply because “*this is the way we’ve always done things*” in the Local Fraternities.

It is no longer acceptable, understandable and practicable that few people in charge at the various levels, **wear themselves out for the excessive workloads and responsibility**,

¹ St. John Paul II, to the OFS General Chapter, June 14, 1988

² We ought to unify the terminology and the nomenclature of the Order, so as to understand what and whom we are referring to, everywhere in the world: junta, giunta, bureau, executive council, plenary council, assembly, etc.. See also section 6.D, at page 20-21 of this document.

ending up, at the end of their terms, physically and mentally drained, just as it is not possible to accept **hegemonies of individual persons or groups**.

IN SEARCH OF A MODEL

In various ways, according to the different places, Secular Franciscans, in addition to the **model of the Local Fraternity** (unsuitable for the higher levels and, often, wrongly implemented at the local level), have tried to get inspiration from models borrowed from the **organization of religious Orders** or of **lay associations** of various nature. These models, however, are also concretely unsuitable and therefore inapplicable.

In fact, we are **neither one nor the other**. Nor their identity and nature are anywhere near or similar to ours.

We are not “regular” religious. They do not have family commitments, live under the same roof and dedicate 100% of their time to the life of their Orders to which they are bound by a vow of obedience.

We are not like any other lay association or third order (as described in Canon 303).

“Third Orders” are appendages of their respective religious Orders that govern them. They do not have a capillary and articulated diffusion as we have. They do not have a true autonomy nor a management of their own but are concretely directed, influenced and dependent on the religious. They are very different from us.

Lay associations have usually very different characteristics, mission, diffusion and origins with respect to us. Most of them were founded in very recent times. So, it is not possible to look at them to borrow organization models or functioning schemes. Moreover, many of the so called “lay” associations are often concretely run by *clergy*.

In any case, it is not the purpose of this presentation to describe the profound differences existing between them and us.

A deep and well pondered **reflection**, followed by concrete **“experimentations”**, are needed to find a model and a style which fully suit our identity and nature and that can be adopted by the whole Secular Franciscan Order.

2. SOME FUNDAMENTAL REFLECTIONS ON THE NATURE OF THE SECULAR FRANCISCAN ORDER

We have been confronted with and have solved (though not always in a fully satisfactory manner) many of the most urgent and pressing problems that have monopolized the attention of the OFS leaders since 1978 to date. Now, it is our duty to pause and reflect on ourselves (*who are we, as secular Franciscans*), on the basis of the true **nature** and **identity** of our Order and of the precious **experience** gathered during the 36 years from the promulgation of the new Rule, the new General Constitutions, Ritual, Statutes and unified status.

We wish to briefly touch, now, on just a few points that we consider essential to understand the nature of our Order and to develop our theme.

A. THE FRANCISCAN FAMILY AND THE OFS ACCORDING TO THE PROJECT

INSPIRED BY GOD TO SAINT FRANCIS.

1. THE OFS: A REPRESENTATIVE SAMPLE, A PROTOTYPE OF CHURCH

God inspired Francis to form a **threefold family** to include **all members of God's People**, men, women, lay, religious, ordained, single and married (a *representative sample*, a *chosen prototype* of the Church-Total Christ), in order that there may be people who, by fully conforming to Christ, like saint Francis, *in every state of life*, may **bring and offer Christ**, the *total Christ*, to the whole world and repair the Church in each of its components. The first article of our Rule fully confirms this.

Francis of Assisi did not try to **live Christ** only considering some aspects of His life. Francis tried to live Christ **in His total fullness**, by following every aspect of His life. Francis strived to be conformed to the Total Christ to the point of being considered an *alter Christus*, another Christ. Saint Francis, therefore, effectively, bore and brought to the world the whole Christ, **the total Christ**.

We must follow Christ in the footsteps of saint Francis and must tend to the very same conformation.

OUR VOCATION-MISSION AS SECULAR FRANCISCANS IS IDENTICAL: WE MUST BEAR AND OFFER THE TOTAL CHRIST !!!

Our Order is indeed very significant in the Church if it fully corresponds to God's project and fulfills the expectations of the Church.

There is a project of grace on all of us which is not yet fully understood and largely unexploited.

We have a role in the Church which fully corresponds to Saint Francis mission, to implement in union with the entire Franciscan Family, of which **we represent more than 65%**³

It is about time for us to fully live up to our mission and to the expectations of the Church both as individuals and as an Order.⁴

Holiness has always been present in the Order in individual persons. There are always generous souls, thanks be to God. They blossom everywhere. Not only in the Franciscan Family.

Where we are most wanting is **to be and work as an Order**.

THERE MUST BE A REASON WHY THE CHURCH, AFTER 8 CENTURIES, AGREEING TO THE UNHEARD REQUESTS OF THE FRANCISCAN PENITENTS OF THE 13TH CENTURY, FINALLY WANTED TO ESTABLISH US AS A UNITED AND CENTRALIZED ORDER!

Certainly, this reason does exist and it corresponds to the original project that God inspired to Francis. Now, we cannot fail to live up to the expectations!

2. LAY AND SECULAR STATE

³ **Quantitatively**. Regrettably, due to our diffuse lack of preparation, our persisting substantial dependence on the religious in a number of countries, the little consideration in which we are kept as seculars and lay, our lingering in an indefinite "status quo", **qualitatively**, we count very little in the Family, almost nothing. On the contrary, every member of the Family ought to be considered as having equal dignity and, due to our large numerical presence in the world, the Family should rely on us more confidently.

⁴ Message of Saint John Paul II to the OFS General Chapter, 22 Nov. 2002.

The Secular Franciscan Order is a providential and necessary “state and form of life”, inspired and raised up by God to Francis of Assisi within his Family to accomplish his mission. This “state” is absolutely indispensable for the completeness of the Franciscan Family and of the Church.

We must become fully aware that the OFS is a unique and essential reality in the Church with very personalized characteristics.

3. THE IMPORTANCE OF BEING AN ORDER WITH A CENTRALIZED STRUCTURE

Francis of Assisi inaugurated the “apostolic” form of religious life.

At the time of Saint Francis, the only forms of religious life were the monastic one (monks), the eremitical one (hermits) and the canonical one (Canons Regular). They were characterized by the fact that the religious lived always in the same place and were under the authority (and still are) of the bishops of the local Dioceses.

Francis inaugurated a new “itinerant” religious form of life, like that of Jesus and his apostles, to bring and announce the Gospel to the whole world and to preach penance (conversion). His religious family received its mandate directly by the Pope (not by individual bishops) and, therefore, it was placed under the direct authority of the Holy See. His “monastery” is the world.

The Second and Third Franciscan Orders were founded to accomplish the very **same apostolic vocation/mission** in the entire world in a **coordinated manner** with the First Order.

Thus, **the Third Order, the Secular Franciscan Order, assumes the typical characteristics which represent the SECULAR (in the world) PROJECTION OF THE RELIGIOUS EXPERIENCE OF SAINT FRANCIS AND OF HIS APOSTOLIC VOCATION/MISSION FOR THE WHOLE WORLD**, just as the Second Order (the Poor Clares) is the projection of his religious experience in the cloistered world.

In order to be able to accomplish this mission in a coordinated and efficacious manner, in the whole world, the first Order needed to have a single, unified world structure, not depending on the individual bishops but under the direct authority of the Holy See (the Pope).

In a similar manner, the **third Order, the OFS, does need a similar coordinated world structure and to be under the authority of the Holy See** (the Pope).

Only, for their apostolic activities in a given diocese, both the 1st and 3rd Order depend on the corresponding bishop, but for their organization, internal coordination and life, they are always under the direct authority of the Holy See.

The new OFS Rule finally put things back in order and regulates the life of the 3rd Order in accord with its original nature and identity and, at last, the Franciscan Family can operate and live according to its original joint authentic vocation/mission.

Now, it is necessary for the three branches of the Family to understand that the time has come to relinquish their individual “splendid” solitudes, and to start to closely collaborate among themselves: the First Orders among themselves and, together, with the Second and the Third Order; Third Order Regular and the several institutes that share the same Rule

among themselves and, together, with the rest of the Family. All this needs to be implemented in a very concrete manner and not just formally!

We still have a long way to go in this area and the OFS can do a lot by acting as a glue and catalyst for all the members of the family, as it already does.

B. UNITY OF THE OFS

The unity of the OFS is described as “ORGANIC”. This means that every Fraternity, and consequently **each of its members**, is a part of the same body, and represents an *essential organ* of it.

«The Secular Franciscan Order ... is an **ORGANIC UNION of all Catholic fraternities** scattered throughout the world ... ». (RULE 2)

«The OFS is divided (*articulated*) into fraternities of various levels, the purpose being to promote, in an orderly form, **the union and mutual collaboration among the brothers and sisters and their active and communal presence in both the local and the universal Church**. The OFS shall also support the commitment of the fraternities in their service to the world, and specifically to the life of society». (G.C Art. 28.2)

«Local fraternities are **grouped** into fraternities at various levels: regional, national and international according to criteria that are ecclesial, territorial, or of another nature. They are **coordinated and connected** according to the norm of the Rule and the Constitutions. **This is a REQUIREMENT of the COMMUNION AMONG THE FRATERNITIES, of the ORDERLY COLLABORATION AMONG THEM**, and of the **UNITY** of the OFS». (G.C. Art. 29.1).

Unity, coordination and connection are extremely important objectives in order to feel and be an Order. Great progress has been achieved, but we are still far from the objective of being and acting as **one** in the Church and in the world. A concrete unity of life and intents would render us a “force” of remarkable impact for our mission in the world, in unity with the whole Franciscan family.

C. ORDER OF BROTHERS AND SISTERS AND COLLEGIALITY

It is essential that **ALL** Secular Franciscans understand that we are an **Order of Brothers**.

“... the Lord gave me **brothers** ... the Most High Himself revealed to me that I had **to live according to the form of the holy Gospel**. (Testament 14)

The vocation of the OFS is a vocation to live the Gospel in fraternal communion. G.C. Art. 3.3

In virtue of its foundational nature, our Order **must** have an **ABSOLUTELY COLLEGIAL** management and direction.

The Fraternity Councils are responsible for the **animation and guidance** and the Councils of the higher levels are responsible also to **connect and coordinate**.

«**While firmly upholding**

the CO-RESPONSIBILITY of the Council (local) to animate and guide...

the CO-RESPONSIBILITY of the Council for the animation and guidance of the regional Fraternity

the CO-RESPONSIBILITY of the Council for the animation and guidance of the national Fraternity the CO-RESPONSIBILITY of the CIOFS Presidency ... » (G.C. Art. 51, Art. 63, Art. 67, Art. 74)

*«On various levels, each Fraternity is ANIMATED AND GUIDED by a Council and Minister, **who are elected** by the professed according to the Constitutions.*

*Their service, which lasts for a **definite period**, is marked by a **ready and willing spirit** and is a **duty of responsibility** to EACH MEMBER and to the COMMUNITY.*

Within themselves, the Fraternities are structured IN DIFFERENT WAYS according to the norm of the Constitutions, ACCORDING TO THE VARIOUS NEEDS of their members and their regions, and under the guidance of their respective council». (Rule 21)

We note again that there is an **obligation to serve** the INDIVIDUALS and the GROUPS and to **contrive and implement differentiated structures**, abiding by the General Constitutions, **according to the specific needs of the members**.

In the Councils (CIOFS Presidency is also a Council), **the Ministers**, who are integral part of them, **have very precise roles** of

- Presidency,
- Convocation,
- Representation,
- Sign of unity
- Assumption of civil and patrimonial responsibility, but most of all of
- **Guarantors and implementers of the decisions of the Councils and of the Chapters.**

The ministers, at all levels, do not have autonomous powers with respect to the Councils, but instead they are the servants of the decisions of the Councils and of the Chapters.

*«... it is the duty of the minister, who has the primary responsibility, **to see that the directions and decisions of the council are put into practice.** He or she will keep the council informed concerning his or her activities».* G.C. 63.1; 67.1; 74.1

Only one exception exists for the Minister General, and is: *to intervene in urgent cases, informing the Presidency of them*, G.C. Art. 74.2 h.

This aspect is usually ignored in the majority of cases by most ministers and also ... by most Councils!

It is, therefore, indispensable to recover, concretely and with full conviction, the fraternal dimension of humble and authentic service, a **truly responsible and collegial governance**, and for the ministers to shun all temptations of domination and of abusive imposition of their will on the others. This is a very concrete challenge in which we must seriously engage ourselves.

D.EXACT UNDERSTANDING OF “SUBSIDIARITY” AND NECESSITY TO LIVE TO “BE ORDER” AND NOT ANARCHY. (ART. 33. C.G)

«1. In the guidance and co-ordination of the Fraternities and of the Order, the **PERSONALITY AND CAPACITY OF THE INDIVIDUAL BROTHERS AND SISTERS AND OF THE**

INDIVIDUAL FRATERNITIES *should* (**must**) BE PROMOTED. The plurality of expressions of the Franciscan ideal and cultural variety must be respected.

2. The councils of higher levels *should* (**must**) **not do** what can be adequately carried out either by the local fraternities or by a council of a lower level. They *should* (**must**) **respect and promote their vitality so that they fulfill their duties properly.**

The local Fraternities and councils concerned *should* (**must**) **COMMIT THEMSELVES TO CARRY OUT THE DECISIONS OF THE INTERNATIONAL COUNCIL** and of the other councils of higher levels, and **TO IMPLEMENT THEIR PROGRAMS, adapting them when necessary to their own situation».**

Subsidiarity is not anarchy but respect of the local realities and encouragement to be responsible.

Subsidiarity is necessary to avoid possible **undue deprivation of authority** of the lower levels and “**dictatorship**” of the higher levels. Nevertheless, the second part of point 2 clearly and strongly underlines that the **OFS is an Order** and that the decisions of the International Council (supreme organ of the Order, of which the Presidency is the governing body) **must** be implemented, with the necessary adaptations.

E. FULL-TIME SECULAR FRANCISCANS

We are secular consecrated persons and we remain such the entire time of our life. Our Profession is a true “nuptial alliance with Jesus Christ” and we have solemnly sworn to live up to what we have professed, every moment of our life. We cannot, and must not, be Secular Franciscans only by name or, as many do, only when we please.

F. FULLY RECONCILE SECULAR LIFE WITH THE RESPONSIBILITY IN THE ORDER.

Our vocation consists in being fully dedicated to the **service of God and of the Church in our secular state**.

We are precious to the Church and to the Franciscan Family to the extent we are and behave as true seculars, fully immersed in the things of the ordinary life of the world.

If our secularity does not allow us to fully accomplish all our tasks within the Order, we have to seek the help of our brothers and sisters who can help us, rather than neglect our other fundamental duties related to our ordinary life, in the family, at work or else. **It is not acceptable to neglect our duties as seculars.** Our specific mission and the service in the Order are mainly focused on the complete fulfillment of all our duties in the family, at work, in society. It is inconceivable to jeopardize one’s marriage, the service to our children, a harmonious family life, work or other, to fulfill our services within the structures of the Order. “Being secular” means to be able to act maintaining the right balance between all our duties and to learn how to work and serve cooperatively as a group, always and in every service position.

“Secularity” (*being in the world for the world*) **is the theological place in which we fully realize our vocation.**

3. FUNDAMENTAL PROBLEMS

WHICH PREVENT THE ORDER TO FULLY DEVELOP INTO WHAT IT SHOULD BE

The present situation of the Order, despite the great progress attained in the last years, is characterized by four basic problems.

1. **Lack of understanding and awareness of the commitments made with our Profession to fully correspond to God's vocation for us.**

This is the result of an inadequate formation and is responsible for the

2. **Lack of commitment** of many members **to enter into a serious conversion journey.**
3. **Substantial ignorance of the Sacred Scriptures, of the writings of Saint Francis, of the essential texts of Franciscan spirituality, of the OFS Rule, of the General Constitutions, of the Ritual ...**
4. **Absence and/or lack of implementation of organizational structures and projects of the Order,** consistent with its *nature*, which may allow a satisfactory spiritual and apostolic development.

These themes are closely interconnected and influence and determine one another.

These basic problems may be summed up in two fundamental chapters:

LACK OF CONVERSION AND IGNORANCE.

In both FORMATION plays an essential role.

CONVERSION.

Though being an Order of "penitents" (i.e. people who have chosen in full awareness a journey of *conversion*, and should perfectly know the goal to reach (*perfection of love and total conformation to Christ, as Francis*), it seems that, for many secular Franciscans (too many, indeed) true "conversion" is more a topic of conversation than a program of life to implement.

Rarely, can we find ministers and, in general, persons who occupy responsibility positions, who carry out their ministry with *humility* and *authentic sense of service*. We find very often, instead, presumption, prevarication, carelessness, craving to appear, attachment to positions of command, shameless and arbitrary use of the (scanty) resources of the Fraternity, ease to resign if decisions are not promptly endorsed and we so on.

This is not only a matter of not knowing what the Rule and General Constitutions demand (absolutely unacceptable), but more importantly (and this is much worse) it is a total **lack of conversion**, of the true conversion of heart and mind. Though recognizing *in words* that our model of *sequela Christi* is Francis, many (too many, indeed) Secular Franciscans maintain attitudes and practices which are the exact contrary of the *humility, docility, meekness, search of poverty, obedience, profound sense of service and testimony, minority, exemplarity* etc. of Saint Francis.

THE LACK OF AUTHENTIC CONVERSION IS, BY FAR, THE MOST SERIOUS PROBLEM WE ARE CONFRONTED WITH IN OUR ORDER. This is an endemic problem in the Order.⁵

⁵ This, largely, derives from the lack of *discernment of vocation* before admitting candidates to Profession and from a superficial formation. Generally, we speak of 2 years or more of formation.

Can we, dear brothers and sisters, in full honesty, affirm to be sincerely converted, like Francis, or at least to have undertaken an authentic and convinced conversion journey?

IGNORANCE.

Even though there are happy exceptions, we have frequently (too frequently!) observed that in the Order, the habit of reading, studying and meditating the Gospel is not such common practice as it should be (*Secular Franciscans **must commit** themselves especially to careful reading of the Gospel, going from Gospel to life and from life to Gospel.* ⁶ Rule Art. 4).

Very rarely are the other books of the new Testament read, and almost never are the ones of the Old Testament.⁷

The Writings of Saint Francis and his biographies are hardly or superficially known or not at all. Many secular Franciscans simply live of common places. They just rely on sporadic conferences of some good friar and rarely do they engage in individual, assiduous and personalized frequentation of the Sacred Texts, Franciscan Sources and of the OFS fundamental texts.

The Rule is not well known and the General Constitutions much less still ! The Order is not well known, members do not know how it functions and ignore the fundamental rules on which the communion and structural life of the Order is based.

We have been answering for years to tens and tens of brothers and sisters on problems whose answer can be found by simply opening the Constitutions at the right page!

If, starting from ourselves, all of us shall be willing to tackle these problems, then, we will be able to face and resolve, together with the brothers and sisters of the whole world, the problem of the structures and management of our Order and, after adequate trial periods, find solutions which fully suit the nature of our Order.

We must have the courage of asking ourselves as we did before: how many of us can say, in all honesty, to have undertaken in earnest, without looking back, a journey of authentic conversion? How many can say that they are animated only by the desire to completely conform to Christ, **like Francis**?

How many can assert that their activities and behaviour are not often motivated to comply only with routine, formal and bureaucratic requirements rather than by spiritual and fraternal service reasons?

But let us not fool ourselves. If, in average, the candidates meet twice a month for 1 hour, during 10 months in a year, 2 years of formation correspond to only 40 hours !!! Less than 2 days !!! And self-formation is a rarity! Most candidates are content to do formation only during the formation meetings.

⁶ This is a personal and **more faithful** translation from the *typical version* in Italian, as the English translation does not give the impelling sense of the obligation.

⁷ «He who does not know Scripture does not know the power and wisdom of God. Ignorance of Scripture is ignorance of Christ» (S. Jerome, Commentary on Isaiah). – See also St. Francis in 2C, LXXI, 105.

4. OBJECTIVES AND SCOPE OF “MANAGEMENT”

- a. **MANAGING AN ORDER MEANS, IN THE FIRST PLACE, TO KNOW WELL THE OBJECTIVES** to be reached through management.

These objectives are very well known: they are perfectly described in the Rule and in the General Constitutions. However, rarely, do they form the object of serious reflection, study, and concrete application.

b. WHAT ARE THE OBJECTIVES ?

In essence, the **objective is only one: TO BECOME SAINT** (*strive for perfect charity*) and to **BEHAVE CORRESPONDINGLY** (the mission).

All the other objectives stem from this fundamental objective and represent its concrete expressions. Here are the objectives that, most immediately, can be found in our Rule and Constitutions.

RULE:

- Strive for perfect charity in our secular state
- Live the Gospel in the manner of saint Francis
- Make present the charism of saint Francis
- Be witnesses and instruments of the mission of the Church
- Announce Christ by our life and words
- Re-build the Church
- Have the thoughts of Christ: permanent conversion
- Build a more fraternal and evangelical world
- Commit oneself in public life
- Commit in Justice, Peace and Integrity of Creation (JPIC).

These objectives, contrary to what people usually think, **are not private objectives, which concern the only individual persons.**

These objectives **fully concern all and, most of all, LEADERS AT ALL LEVELS.**

We must interiorize and implement all these objectives personally, first, and then we must incessantly and passionately work to assist all others to accomplish them.

*«The office of minister or councilor is a fraternal service, a commitment to hold oneself available and responsible in relation to **each brother and sister and to the fraternity so that each one will realize his or her own vocation** and each fraternity will be a true community, ecclesial and Franciscan, actively present in the Church and in society». (C.G. 31.2)*

GENERAL CONSTITUTIONS

- **Animate and guide.**
- **Connect and coordinate:**
 - Work in order that **all the Fraternities** of all levels be **truly united, connected and coordinated**, that they may feel and be **one** and form a *one and only* Order.
 - Work in order that there may be at all levels (local, regional, national and international) true **communion of objectives** of formation, of **apostolic** activities, of

concrete charity, common objectives to **serve the Church and the world**, common objectives to **announce and bear witness to the Good News** (evangelization).

- Periodical area meetings to achieve joint reciprocal *knowledge, sharing and planning*.

As we have already said above, **unity, coordination and connection** are extremely important objectives in order to feel and be a true Order. There is still a lot of work to do to achieve this objective. And (it's worth repeating it), if we manage to reach a concrete unity of life and intentions, we could become a tremendously powerful "instrument" to accomplish our mission in the world, together the Franciscan Family.

«Local fraternities are grouped into Fraternities at various levels: regional, national and international according to criteria that are ecclesial, territorial, or of another nature. They are coordinated and connected according to the norm of the Rule and the Constitutions. This is a REQUIREMENT of the communion among the Fraternities, of the orderly collaboration among them, and of the unity of the OFS». (Art. 29 1)

- c. In order to accomplish the objectives, it is essential to **CHOOSE THE RIGHT PEOPLE** without yielding to the temptation of voting for our best friends, our "allies" who would favor our personal convenience or goals. The people we choose ought to **know well the nature** of the Order and its rules and should have the particular talents that are necessary to accomplish what the Fraternity needs in that particular moment.

«The leaders of the OFS at every level must be

- *perpetually professed,*
- *convinced of the validity of the Franciscan evangelical way of life,*
- *attentive to the life of the Church and of society with a broad and encompassing vision,*
- *open to dialogue, and*
- *ready to give and receive help and collaboration».* (G.C. Art. 31.3)

- d. After having clarified the objectives, it is necessary **TO HAVE A PROJECT** and to **predispose PREVENTIVELY the actions** and the necessary and efficacious **organization** to implement it.

Very often, instead, in the absence of precise projects, we let **the events dominate us and dictate our priorities and agendas**. There is a widespread tendency to wait for a problem to occur, and to intervene afterwards, rather than to lay the bases to prevent the problem to occur. So, we end up running after the events rather than planning them and steering them to reach the objectives.

1 THE INSTITUTION, STRUCTURES AND PROJECTS MUST NEVER STIFLE OR HINDER THE MOTIONS THAT THE SPIRIT RAISE UP IN ALL OF US.

It is indispensable to have well thought, precise projects, consistent with the spiritual and institutional aims to reach: we are an Order and the word "order" reminds us of the necessity to organize our life in a regular and orderly manner so as to accomplish our common vocation and mission. This, however, must not be done bureaucratically.

The institution must never stifle or hamper the motions that the Spirit freely arouses in the persons.⁸ The leaders in charge, therefore, will always have to be very attentive to discern these impulses. We must learn how to listen and discern, and, when necessary, be able to modify our decisions.

f. Finally, it is absolutely essential to fully develop and wisely apply all the **INSTRUMENTS OF SELF-DETERMINATION AND PERSONALIZATION** provided for in our G.C., to comply with the needs of environmental, cultural, social and political diversities which characterize each country, within the framework of our Rule and General Constitutions.

In practice, this never occurs!

Suffice it to see how National Statutes are conceived, to understand how little they are “particular”. Often, Statutes are partial or total duplicates of the General Constitutions!

Art. 29.3. G.C. - **NATIONAL STATUTES must indicate the criteria for the organization of the OFS in the nation.** *The application of these criteria is left to the prudent judgment of the leaders of the fraternities concerned and of the national council.*

This article explicitly obliges (*must*) to find concrete and personalized ways to organize the Order, confiding in the faithful (*prudent*) creativity of the leaders, to better accomplish the objectives.

«Where the situation and the needs of the members require it, sections or groups which gather members sharing particular needs, common interests, or the same operational⁹ choices, may be established within the Fraternity under the guidance of the one council.

Such groups can give themselves specific norms relative to their meetings and activities, firmly remaining faithful, however, to the requirements which arise from membership in the one fraternity. National statutes may establish criteria suitable for the formation and functioning of these sections or groups». (Art. 34 G.C.)

This article offers broad perspectives also to organize structures that are consistent with the implementation of the objectives of the Fraternity Councils. We must learn, when pertinent and applicable, to make a non restrictive reading of the articles of the G.C. .

5. SOME CONCRETE PROBLEMS

We will indicate just a few which correspond to our experience and personal sensitivity. Afterwards, each one of you should offer his/her own constructive contribution on these and other possible topics on the basis of his/her own experience and sensitivity.

1. LACK OF COLLEGIALLY AND “DICTATORSHIP” OF THE MINISTERS. !!!

This is the most frequent problem in the Order. The problem exists not only because there are ministers who think they are entitled to have absolute powers but also because

⁸ Cardinal Carlo Maria Martini, his last interview: *«We could, at least, look for men who are free and closer to their neighbors. Such as Bishop Romero and the Jesuit martyrs of El Salvador. Where are the heroes who can inspire us? For no reason whatsoever we have to limit them by the bonds of the institution.»*

⁹ This important adjective is missing in the English version. The *typical edition* in Italian recites: *«... identità di scelte operative»*: identity of operational choices.

there are councilors who are convinced that the minister is responsible and empowered to do everything, or who simply have no intention to get involved to serve.

The solution of this problem entirely resides on the full compliance with our Rule and General Constitutions. We have already dealt with this topic at point 2 section C at page 6 and 7 of this report.

2. COUNCILLORS WHO DO NOT ACCEPT INTERFERENCES OF THE MINISTERS AND COUNCILS.

This is due to **individual personalities, lack of conversion and ignorance**, but also to the fact that the election of individual candidates (this now the prevailing fashion) by the Chapters give the wrong *impression* to these people that the **Chapters have conferred to them a direct and personal mandate** and as a consequence they presume that they are only responsible directly to the Chapters and not to the Councils. This is completely wrong! A methodological and mature reflection is needed to eliminate this serious error.

3. CHRONIC LACK OF FINANCIAL RESOURCES !!!

We still adopt a financial contribution system from the National Fraternities that has proven its inefficiency and the impossibility to produce improvements.

We virtually have no other source of revenue.

4. EXHAUSTING WORKLOADS FOR THOSE WHO, IN THE COUNCILS, REALLY COMMIT THEMSELVES TO SERVE THE BROTHERS.

This situation produces "exhaustion", physical and mental, in the people who are seriously committed to serve and it causes significant problems to the individuals and to the whole Fraternity. It causes a loss of sense of responsibility in the other members of the Council and of the other Fraternity members. It favours possible authoritarian management, which mortifies fraternity and collegiality.

5. INSUFFICIENT OR NO INVOLVEMENT AT ALL OF NON ELECTED MEMBERS, IN THE ACTIVITIES TO BE PERFORMED AT ALL LEVELS !!!

The structures must always rely on the **best possible competencies**, ability, experience and availability to serve in the Fraternities, even if provided by non elected members. The elected members will always have the final responsibility and the wise coordination of all structures.

«(All) The brothers and sisters are co-responsible for the life of the Fraternity to which they belong and for the OFS as the organic union of all the Fraternities throughout the world». (G.C. Article 30.1)

6. LACK OF PERMANENT STRUCTURES TO SUPPORT THE ESSENTIAL GOVERNMENT FUNCTIONS AND THE FUNDAMENTAL ACTIVITIES OF THE ORDER.

This is what causes the problem described in point 4 above and is the result of what has been described in point 5. Some stable streamlined structures are needed to guarantee:

- Continuity of contents and action in the longer term
- Accomplishment of all the tasks of the Councils
- Fair distribution of workloads and greater efficiency in the implementation of tasks.

In the Order there is the widespread tendency to adopt the universally deprecated "spoils system" used in the political world. When ministers and Councils change the tendency is to change also all collaborators irrespective of whether they were good or bad.

Also the entire set-up of systems and projects of the previous “administration” tend to be radically changed, even if things had worked properly.

One thing is to give new impulse, to correct the patent errors and implement new essential projects, another thing is to restart all over and over again only because the new Ministers or the new members wish the activities to be in their image and likeness, to affirm their “authority” and superiority!

At the International level there are no **efficient and coordinated systems of decentralization**.

7. SELF-ISOLATION AND EXCESSIVE LOCALIZATION IN THE PARISHES OR LOCAL COMMUNITIES. PERSISTING DEPENDENCE ON RELIGIOUS.

8. SUBSTANTIAL LACK OF WELL PREPARED AND AVAILABLE PERSONS !!!

This is one of the reasons why it is largely impossible to create valid and lasting support structures. Such lack of well prepared people prevents the Order to develop an internal “know-how”. This obliges the Order to seek help outside and often times, even if such external help may be qualified, these persons may not speak the same language of the seculars and may substantially ignore their actual needs, history, Rule, identity etc.

9. FRATERNAL AND PASTORAL VISITS !!!

The **time** we dedicate to National Fraternities in FPV (but it is even worse in the Fraternities of lower levels) is always **extremely short, both during the on-the-spot visit and afterwards, if there are problems that require time and personal presence**. Concretely, it is always impossible to maintain a **continuous operational contact** and, if needed, a **protracted presence of the visitors on the spot**, to accompany and resolve the problems encountered. Often, the problems we find (which we rarely manage to resolve completely) need a direct, repeated and prolonged presence.

10. INSUFFICIENT INVOLVEMENT IN CHURCH STRUCTURES AND DYNAMICS (LOCAL, DIOCESAN, GENERAL, G.C. ART. 62.2.b, 66.2.i).

11. INSUFFICIENT INTERACTION, IN CONCRETE AND OPERATIONAL TERMS, WITH THE REST OF THE FRANCISCAN FAMILY. LACK OF SHARED OBJECTIVES AND ACTIVITIES.

On this point, however, religious are more deficient than we, because they usually work as single isolated Orders. By and large, there is not yet a sufficient awareness in the Franciscan Family of the need to operate all together to accomplish the common apostolic objectives of mission and evangelization. Often times, there is no desire to work together.

12. VERTICAL AND HORIZONTAL COMMUNICATION IN THE ORDER !!!

We know very well, through our own experience, that the **transmission chain from the International Fraternity/Presidency downwards, most of the times**, stops already at the National Fraternity level, and almost never does it reach the local levels. If we do not correct this, it is simply an illusion that the Order may ever change to become what it is supposed to be.

With few exceptions, local, regional and national Fraternities have no contacts, exchanges or collaboration among themselves and less still do they share concrete projects.

Lack of communication is largely the responsibility of the higher levels who, in fact,

have the task of coordinating and connecting, but also of the Local Fraternities that often times do not wish to come out of their shell.

Finally, there is often no horizontal communication even from ministers toward the members of their own Councils and vice versa !!!

13. LACK OF UNDERSTANDING OF THE NATURE OF THE RELATIONSHIP OFS-YOUNG FRANCISCANS (YOUFRA). LACK OF ASSUMPTION OF RESPONSIBILITY TOWARD YOUFRA.

*«OFS considers itself to be particularly responsible for Franciscan Youth, which is formed by those young people who feel called by the Holy Spirit to share the experience of the Christian life in fraternity, in the light of the message of Saint Francis of Assisi, **deepening their own vocation within the context of the Secular Franciscan Order**».* (G.C. 96.2)

*«The OFS ought to¹⁰ **(must)** be ready to share its experience of evangelical life with the youth ... ».* (G.C. 96.1)

With rare exceptions, Secular Franciscans usually do not comply with what the Rule and the General Constitutions demand!

*«The Franciscan Youth has a **specific organization**, methods of formation, and teaching methods adequate for the needs of the world of youth ... ».* (G.C. 96.5)

YouFra enjoys broad margins of autonomy within the OFS.

In most cases, on the contrary, Secular Franciscans expect and claim to rule over YouFra, and when YouFrans refuse, the answer is indifference and loss of interest for them.

All duties rest on the OFS: animation, adequate Franciscan formation, sharing of the experience of evangelical life.

We are aware of several abuses in many countries and of substantial unwillingness of the OFS to comply with their duties towards YouFra.

*«The Franciscan Youth ... requests from the competent secular leaders ... **fraternal animation**».* (G.C. 96.6)

*«The OFS fraternities **(must)** commit themselves to give to the Franciscan Youth Fraternities a fraternal animator, who ... guarantees an adequate secular Franciscan formation.* (G.C. 97.2)

*«A representative of the Franciscan Youth is to be designated by his or her council to **form part of the OFS council of the corresponding level;**
a representative of the OFS, designated by his or her own council, **forms part of the council of the Franciscan Youth of the same level.***

The representative of the Franciscan Youth has a vote in the OFS council only if he or she is a professed secular Franciscan». (G.C. 97.4)

With rare exceptions, the OFS systematically ignores the duties imposed by the Rule and General Constitutions. The vast majority of the local and regional Fraternities do not implement this exchange of representatives which is essential to *promote a close communion with the OFS* (G.C. 97.3).

The relationship at the International level does work well.

¹⁰ Again, here the translation in English is incorrect. The *typical version* in Italian says: “deve”= must.

The Church, within the context of the Franciscan Family, has entrusted to the OFS the task of taking close care of the Young Franciscans, within its own organization.

This task must be fully accomplished and with joy and strong conviction.

THE OFS NEEDS YOUFRA MORE THAN YOUFRA NEEDS THE OFS !

6. PROPOSALS TO RESOLVE SOME OF THE ABOVE PROBLEMS

On the basis of the foregoing analysis of the problems and in full compliance with our own law, we offer some tentative solutions and working hypothesis.

The dialogue is open and we trust that the largest possible number of Secular Franciscans will also **give their personal contribution** which ought to be the fruit of your mature reflection (recognition and analysis of the problems, full knowledge of the *nature* and of the rules of the Order) so as to allow the formulation of shared proposals on which we can initiate a dialogue within the whole Order.

A. CREATION OF PERMANENT STRUCTURES

To allow

- an effective continuity and consistency of contents and actions
- full performance of the tasks of the Councils
- a “humane” distribution of workloads.

1. FORMATION OFFICE

To connect and coordinate the various projects (initial and on-going formation, formation of formators, etc.) so as to guarantee an overall substantial unity of direction and coherence of contents.

The people responsible for the projects may be chosen also from among Secular Franciscans who are not elected members of the Presidency or of other Councils. The coordination and the direction of the Office will always be **the direct responsibility of the Presidency** (or other Councils).

The possibility of choosing people outside of the Presidency or Councils will guarantee the contribution of the **most qualified, expert and available persons from the whole Order.**

2. PERMANENT ORGANISM TO COORDINATE JOINT ACTIVITIES WITHIN THE FRANCISCAN FAMILY AT THE VARIOUS LEVELS.

This is absolutely necessary so as to guarantee a continuity of presence, and to have more specific weight in the Family and not be considered always as *minus habentes*.

Representation obviously belongs to the respective Minister, but Ministers need qualified structures to help them fulfill this task.

At present, the **interactions in the Family are too scanty, virtually non-existent. Religious Orders are still too self-referential** and they do not live with the necessary intensity and conviction the interchange and collaboration in and with the Family. Much progress has been achieved on the perception and sensitivity of this topic, but the level of cooperation and sharing is still largely insufficient.

The OFS has acted as a *catalyst* and promoter of union and communion and it must continue to do so, by promoting structures and initiatives to reinforce its role with greater conviction.

3. **PERMANENT SCHOOL FOR THE PREPARATION OF TRULY COMPETENT PERSONS IN THE AREAS OF THEOLOGY, SPIRITUAL AND FRANCISCAN FORMATION, JURIDICAL MATTERS (CIC), JPIC MATTERS, to guarantee to the Order's an in-house own expertise and competent and qualified experts.** (International)

4. **ANNUAL COURSES OF FORMATION** (centralized or de-centralized) **FOR THE RECENTLY ELECTED MINISTERS AND INTERNATIONAL COUNCILLORS** (also if at 2nd or 3rd mandate – *repetita juvant*) and **other Council members. Also for the Ministers at the other levels.**

To assure a suitable preparation to those who take up “government” responsibilities.

5. **INTERNATIONAL AREA COORDINATION ORGANISMS, to include THE INTERNATIONAL COUNCILLORS OF THE AREA, UNDER THE GUIDANCE OF THE RESPECTIVE PRESIDENCY COUNCILLOR, to implement the Chapter and Presidency projects.**

6. **STABLE STRUCTURE TO HANDLE CONTACTS WITH THE HOLY SEE with qualified and expert persons, who report directly to the Minister General.**

7. **POOL OF PERSONS OF GREAT EXPERIENCE IN THE ORDER, who have proven to possess characteristics of balance, spirituality and relational ability who may be delegated by the Minister General TO PRESIDE OVER NATIONAL CHAPTERS OR CONDUCT FRATERNAL VISITS, when other Presidency members are not available or when the situation may so require. The Minister general is not obliged to delegate only members of the Presidency or of CIOFS and can choose according to his/her best judgment.**

8. **OFFICE FOR THE POSTULATION OF THE CAUSES OF SAINTS.**

9. **OFFICE FOR FINANCIAL MATTERS WITH STABLE PERSONNEL under the guidance of the General Treasurer and the supervision of the appointed Presidency Councillor.**

10. **AD HOC STUDY OFFICES**

To perform surveys, compilation of texts, letters, projects and programs to avoid overburdening of the Presidency (and of Councils).

The Presidency (or the Councils) will give the precise inputs and define the limits of the tasks. Members of the Councils (Presidency) would overview, verify and approve the work. The Council (Presidency), collegially, would examine the final result and approve.

In order to reach this goal, the Executive Councils will have to choose and appoint competent persons (mandates and terms at the discretion of the appointing Council) who will offer permanent collaboration.

- The appointments would automatically end with the elective Chapters.

- The persons may be confirmed (or changed, proven to be unsuitable) without time limit – since they can be dismissed anytime.

B. SUFFICIENT AND CONSTANT FUNDING

We must implement systems that enable us

1. **to improve and optimize the funding through the contributions from our own Order** which are now our only financial resource and
2. **to obtain revenues in addition to the annual contributions** of National Fraternities.

There has not yet been the will or the time to make *courageous* and *creative* reflections to explore other ways. Possible ideas on which we could discuss:

1. DIRECT FUNDING FROM THE BASE.

National Councils often do not pay all their dues for the reason that most of the time they simply DO NOT HAVE the money! They do not receive sufficient contributions, if any, from the lower levels and, often times, they do not even have precise criteria for the contributions from the lower levels.

Art. 30.3 of the G.C. specifically says that ... *the brothers and sisters* ought to¹¹ (*will*) *provide the means necessary for supporting the activities and the operations of the Fraternities at higher levels, both by their financial assistance and by their contributions in other areas as well.*

MONEY ALWAYS COMES FROM THE INDIVIDUAL BROTHERS AND SISTERS OF THE LOCAL FRATERNITIES!

We must make an effort to establish a system where the brothers and the sisters contribute right from their own Local Fraternities, **in a differentiated manner**, in favour of the Fraternities of higher level, including the International Fraternity.

If funds are collected directly “**at the source**” and transmitted to the higher levels of their own countries, already “labeled” with their specific destination, the National Councils will no longer have the worry (and the inability) of finding the funds.

2. VARIABLE FINANCIAL CONTRIBUTION ON THE BASIS OF YEARLY PRESIDENCY (or Council) BUDGETS.

Percentage Quotas should be established for each National Fraternity on the basis of the present contribution (or other acceptable mechanism). Each Fraternity would be called to contribute its percentage quota of the annually approved budget.

If, e.g., a National fraternity must contribute 10% of the total budget and the approved budget by the Chapter is € 150,000, this Fraternity will have to pay € 15,000. And so on.

This method would allow the full completion of all the necessary budgeted activities.

With the *per capita* contribution method based on the number of professed members, the Presidency (or the Councils) will be limited to plan whatever projects and activities may fit into the expected revenue and will not be able to do what the Councils or the Fraternities would like to, or should, implement.

¹¹ To be faithful to the *typical edition*, it should be translated “will”.

3. PUBLISHING ACTIVITY, in more languages, for common texts of Formation, History, Spirituality and other fundamental themes for the life of the Order.

This activity would allow

- to **circulate the same texts** of formation, culture, history and spirituality **throughout the world**, guaranteeing a shared and homogeneous basic **formation** and
- to **obtain profits from the sales**.

Certainly, at the international level (or in large Fraternities) there would be a sufficient number of potential purchasers to undertake this activity because. At international level, even if we consider that a mere 10% of the world Secular Franciscans would purchase the books, we could have a potential 40.000 possible “clients”! We must learn to think global.

C. PLANNING, WORKING METHODS AND TIMINGS TO MATCH (and not exceed) THE ACTUAL HUMAN AND FINANCIAL RESOURCES. PRIORITIZATION.

- **Working agendas should never be overloaded**, especially if the topics are complex.
- **Do not aim at doing more than you can possibly do**
- **It is better to do few things well rather than try to do too much and do it badly.**
- **It is important to give priority to important things rather than to the supposedly urgent ones.**

It is very important to discuss in depth every item in the agenda making sure that all Council members are well informed to make responsible decisions.

The items to be discussed, and on which decisions have to be made, have to be carefully prepared well ahead of time by the presenter, providing all elements necessary for the assessment and all members **MUST** examine the issues **BEFORE** the meeting, except in cases of evident *force majeure*. It is better to wait a little longer and consider all the aspects of a matter rather than simply “get it over with”.

D. UNIFY THE LOGIC, NOMENCLATURE AND FUNCTIONS FOR EQUIVALENT STRUCTURES IN THE ORDER

THE BASIC STRUCTURES OF FRATERNITIES

- The two Fraternities **canonically erected by the hierarchical Church** are the **Local Fraternity** and the **International Fraternity**.
- The **intermediate Fraternities**, Regional and National, are **canonically constituted** by the **respective higher-level Councils**, National and International.

The **Local Fraternity** is *unique* in nature.

It is the place where **all brothers and sisters concretely live** and where, **all participate in the life and fundamental decisions** of the Fraternity.

The **Fraternities of higher level** are the **union of the corresponding Local Fraternities**. Their Councils have the task (just like the CIOFS Presidency) of **connecting and coordinating, animating and guiding**, in the logic of the corresponding levels, without undue interferences in what Local Fraternities can do by themselves. In the structures of

the higher-level Fraternities **do not live all the brothers and sisters of that level but only those who have been elected in the corresponding Councils or Presidency.**

The mandatory functions contemplated for the Local Fraternities *may* be a model for the other structures but **not in a binding way.**

There are different logics presiding over the formation of the Councils and the election of their members. Above all, **the rationale of the structures is different.**

In the Local Fraternity ALL members actively participate in everything.

In the **connecting and coordinating Fraternities** (higher level) there should be, instead, a **representative mechanism and structure** and an **executive government organ.**

For the higher-level Fraternities it should be necessary to apply the **ANALOGY WITH THE INTERNATIONAL LEVEL.**

In other words, in these intermediate Fraternities it is strongly advisable to apply criteria that distinguish between the two sets of functions: **representative** and **executive.**

The International Fraternity (the Order as a whole) has an organ, the **INTERNATIONAL COUNCIL**, in which sit, with absolutely **equal representation**, the **representatives** of ALL the Constituted National Fraternities. When this Council meets as a **General Chapter**, it **has the supreme legislative, deliberative and elective power** in the Order.

Within this organism there is a **Presidency (executive organ)**, which is an integral part of the International Council.

Regional and National Councils, **in analogy with the International Council**, should, therefore, consist of a *representative body* formed by all the representatives of the lower level. This *representative Council* will have within itself an *executive organ* (like the CIOFS Presidency), which has the task of *managing the Order* and of *practically implementing the Capitular decisions.*

The fact that an Executive Council¹² **is only optional**¹³ at the **regional and national levels**, while it is **mandatory for the Order as a whole**, is evident.

There may be very small regional or national Fraternities for which a single Regional or National Council, having both representative and executive attributions, is sufficient, by electing a Minister and whatever other functions the Fraternity will consider necessary¹⁴.

In the large and numerous Fraternities, instead, the **National Councils** should always have a **representative organ** in which all the Regional Fraternities (or Local, if there aren't Regional fraternities) have an *equal representation* and, within these Councils, there will have to be an **Executive Council** (or national Presidency), formed by those who have been elected in the corresponding Chapters, having **executive functions** between Chapters.

The same would apply to the Regional Fraternities, *mutatis mutandis.*

It is not rare to hear that, due to a wrong interpretation of the General Constitutions, in some places the word *giunta* (in Italian), *junta* (in Spanish and Portuguese), *board* (in English) and *bureau* (in French) is understood as a reduced group of 2-3 persons chosen

¹² The "Executive Council" terminology is used in English, "Bureau" in French and; *giunta esecutiva* and *junta ejecutiva/executiva* in Italian, Spanish and Portuguese.

¹³ C.G. 62.1 e 66.1: .. **may** be set up an executive council, whose duties are determined by the Statutes.

¹⁴ ... the regional council is constituted according to the provisions of the National Statutes and of its own regional Statutes, 62.1; ... the National Council is constituted according to the provisions of the National Statutes, 66.1

among those elected in the Chapters, which may take up the leadership, in fact depriving of authority and responsibility the other legitimate members of the “Executive Council”.

Another reason why the adoption of these criteria would be essential is that where such structures (Representative Council and Executive Council) are not codified in the Statutes, the Fraternal and Pastoral Visits (regional and national) **cannot** be extended to include the lower level Fraternities but must stop at the individual members of Executive Council. In fact, the G.C. recite “to make fraternal visits to the regional (national) Councils”(67.2.f & 74.2.e), and in the majority of the countries, the Councils are identified *tout court* only with the members of Elected Councils (Executive), without contemplating the institution of a larger *representative* Council.

Therefore, the definition and the composition of the Councils is crucial in this sense.

E. FULL VALORIZATION AND PREVAILING IMPORTANCE OF THE SPIRITUAL ASPECTS IN THE WORK OF THE SPIRITUAL ASSISTANTS

The assistants are members of the Councils, in their own right, in order to have **voice and weight** in the *decisions*, with particular reference to their specific role and not because they have to necessarily perform the same work of the *seculars*, to the detriment of their institutional functions of spiritual assistance, which must remain their absolute priority.

For example, the General Assistants are only 4 and we know well that they are overloaded with work. Therefore, they do not have to be **necessarily** included in every single office, commission, working group and sub-group etc., unless in case of matters that are more pertinent to their functions or that the seculars are not well-equipped or capable to deal with. They may always intervene in the discussions, contribute in decision-making, be informed about all projects and intervene at any time, if they so wish.

F. ENFORCE THE MANDATORY OBLIGATIONS CONTAINED IN THE GENERAL CONSTITUTIONS.

The lack of knowledge of the General Constitutions by most Secular Franciscans is one of the major reasons why a number of duties are not complied with or simply overlooked, to use a euphemism.

Just a macroscopic example of a duty never complied with:

- **Preparation of the annual report** to be sent to the higher-level Council, after it has been approved by the Fraternity Council (local). GC 51.2.b
- **Preparation of the annual report** to the National Council CG 63.2f (62.2g)
- **To discuss and approve the annual report to the CIOFS Presidency** CG 66.2h

To our knowledge only 2 or 3 National Fraternities do comply with this duty which is so clearly described in the General Constitutions. The situation with the lower level Fraternities is perhaps even worse.

WHY IS IT IMPORTANT THAT A GENERAL CHAPTER DELIBERATES ON THESE MATTERS?

Because a reflection on these matters and the decisions that will follow:

- **Must be completely shared by all, and must fully correspond to the reality of the**

entire Order,

- **Must be accepted and adopted individually and collectively by all in the whole Order, and**
- **Must be shared and approved by the supreme authority of the Order.**

7. PROJECT FOR THE FORTHCOMING THREE YEAR PERIOD

1. The presentation offered in the Chapter, the present document and the conclusive reflections that will come from the working groups of the Chapter will have to be transmitted to all National, Regional and Local Councils to become the object of reflection and study by all professed brothers and sisters in the OFS.
2. Each National Fraternity shall adopt whatever method they think suitable to realize a joint reflection and shall collect the most workable and significant proposals and reflections, along with the corresponding motivations.
3. All proposals will have to be sent to the **Study Group** appointed by the CIOFS Presidency for this purpose, as soon as possible, but in any case, **no later than 18 months** from the date of the present 2014 Chapter.
4. The **Presidency Study Group** shall evaluate the proposals and shall present them to the Presidency that will integrate the most significant proposals in a conclusive document.
5. The **Conclusive document** shall be sent to all National fraternities in preparation of the 2017 General Chapter. This document will have to circulate among the largest possible number of brothers and sisters. The Conclusive document will have to be sent **no later than 4 months before the 2017 General Chapter**.
6. The Conclusive document will be presented to the 2017 Chapter and will be discussed and voted so as to become an official document to be implemented by the whole Order.

Assisi, November 3, 2014