



## National Fraternity of the Secular Franciscan Order USA (OFS-USA)

### 2022 ANNUAL REPORT to CIOFS

According to the articles 51.2b, 62.2g and 66.2h GGCC, the OFS Fraternities send an annual report to the higher-level Fraternity. Please complete the questionnaire and send it to the Presidency before April 1<sup>st</sup>.

**Date of this report: May 1, 2022**

#### **A. GENERAL INFORMATION**

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- 1. This report describes the last 18 months----- **October 2020 – April 2022****
- 2. This is the report of the National Fraternity of:** USA
- 3. Report made by:**  
National Minister Jan Parker, OFS (contact) [ofsusaminister@gmail.com](mailto:ofsusaminister@gmail.com)  
National Vice-Minister, Mary Bittner, OFS (contact) [mbittner@umich.edu](mailto:mbittner@umich.edu)
- 4. Date of last National Elective Chapter:** October 2018
- 5. Date of last Fraternal Visit:** November 2016
- 6. Date of last Pastoral Visit:** November 2016
- 7. Postal address of the National Council:**  
National Fraternity of the Secular Franciscan Order USA  
1615 Vine Street  
Cincinnati, OH 45202-6492
- 8. Was there a change in the composition of the National Council during the last year? If so, what changed and why?** None other than from regularly scheduled Regional elections.
- 9. If there is an Executive Council: was there a change in the composition in the last year? If so, what changed and why?**

There was no change in the officers, but there is a new National Spiritual Assistant per the Conference of National Spiritual Assistants (CNSA) terms for President-in-turn. This council was elected in October 2018. Due to the pandemic, we are serving until October 2022 at the request of the National Fraternity Council:

Minister:	Jan Parker OFS	<a href="mailto:ofsusaminister@gmail.com">ofsusaminister@gmail.com</a>
Vice-minister:	Mary Bittner OFS	<a href="mailto:mbittner@umich.edu">mbittner@umich.edu</a>
Secretary:	Jane DeRose-Bamman OFS	<a href="mailto:ofsusasecretary@gmail.com">ofsusasecretary@gmail.com</a>
Treasurer:	Claudia Kauzlarich OFS	<a href="mailto:claudiakauz.sfo@gmail.com">claudiakauz.sfo@gmail.com</a>
International Councilor:	Awilda Guadalupe OFS	<a href="mailto:Guadalupewillie882@gmail.com">Guadalupewillie882@gmail.com</a>
Councilor:	Donna Hollis OFS	<a href="mailto:donnadancerfeet@aol.com">donnadancerfeet@aol.com</a>

Councilor:	Josh Molidor OFS	joshuamolidor@yahoo.com
Councilor:	Dennis Ross OFS	dennisross212@gmail.com
CNSA President-in-turn	Fr. Jerome Wolbert OFM	<a href="mailto:jeromeofm@gmail.com">jeromeofm@gmail.com</a>

**10. Did you get by purchase/donation/inheritance or sell/donate/lose assets/properties during the last year? If so, please give a short description.**

No, none of the above.

**11. Do you have questions/requests/suggestions to the Presidency? This can be about any subject. Yes. See the following:**

**11.1 Request for Financial Reporting**

We noted that the Presidency will be sending annual financial reports to national fraternities as mandated by the General Chapter. We request that this report include, income and expenses, fixed assets, and balance of funds on hand. (In the US, these reports are referred to as "income statement and balance sheet.") *Please also see #6, on page 6 of this report, noting other financial concerns.*

**11.2 Request for Communication from CIOFS**

- A. We would like to receive brief reports on the work of the Presidency 2 or 3 times a year. We are often at a loss to know what is happening.
- B. It would be helpful to be alerted when new formation material is posted on the CIOFS website.
- C. It would be helpful to be alerted when a new issue of Koinonia, or other publication from the General Spiritual Assistants are issued or have been uploaded to the website.

**11.3 Past request that remains unanswered**

In last year's annual report we made the following request but have not received an answer.

**Duns Scotus Formation Fund**

The OFS-USA Duns Scotus Formation Fund supports formation efforts at the local, regional and national levels of our National Fraternity. We would welcome a discussion with the Presidency on how we might open the Duns Scotus Formation Fund to support grant requests from other national fraternities.

**STATISTICAL INFORMATION**

<i>Number of Local/Regional Fraternities in National Fraternity</i>	January 1, 2021	December 31, 2021
Canonically established Local Fraternities:	578	573
Emerging Local Fraternities:	18	27
Canonically established but inactive Local Fraternities:	58	64
Regional Fraternities:	30	30
<i>In the National Fraternity</i>	January 1 , 2021	December 31, 2021
Number of permanently professed members:	11,048	10,675*
Number of temporary professed members:	---	---
Number of members in the period of formation:	955	773

<i>In the National Fraternity</i>	January 1 , 2021	December 31, 2021
Number of Fraternities/groups of Franciscan Youth:	1	2
Number of members of Franciscan Youth:	40	167
Number of groups of Franciscan Children:	0	0
Number of Franciscan Children:	4	9
Number of OFS Fraternities of permanent deacons:	0	0
Number of OFS permanent deacons:	72	93
Number of Fraternities of OFS priests (Const. 35,2):	0	0
Number of OFS diocesan priests:	31	24
Number of OFS Bishops:	1	1
Number of groups of members with private vows (36 GGCC):	0	0
Number of members with private vows:	14	15
<i>Number of Local Spiritual Assistants in the National Fraternity</i>	January 1, 2021	December 31, 2021
OFS:	72	77
OFS Conv:	31	29
OFS Cap:	46	47
TOR:	11	10
Poor Clares:	6	4
3 <sup>rd</sup> Order Franciscan religious brothers and sisters:	56	49
Other religious brothers and sisters:	3	3
Diocesan priest/deacons:	56	52
Members of OFS:	112	106
TOTAL number of local spiritual assistants:	360	361**
Number of Local Fraternities without Spiritual Assistants:	175	175

\*In preparation for migration to a new system, during 2021-2022 OFS-USA has made an effort to purge the National Database of duplicates, and to properly designate deceased and lapsed members. See below, [12.4 Converting the National Database to a New Platform](#).

\*\*Note that many of our local spiritual assistants now serve more than one fraternity. See below, [9.1 Declining Number of Spiritual Assistants](#).

## THE NATIONAL FRATERNITY

1. Did the National Fraternity have special [formation projects/activities, and/or pilgrimages, and/or other spiritual activities \(retreats, conferences etc.\) in the last year? Please give a short description.](#)

### **1.1 Regional Formation Director (RFD) Workshops**

The National Formation Commission (NFC) offers semi-annual Regional Formation Director (RFD) Workshops. Topics include formation “best practices”, the OFS Rule, as well as Q&A Sessions. Attendance is usually around 75-100.

**1.2 NFC members provide Regional workshops/retreats** when requested, and facilitated five such gatherings in 2021-2022. Topics include: Profession and Commitment, Rekindling the Franciscan Fire; Ingredients for a Successful Fraternity; Servant Leadership; Role of Spiritual Assistant.

### **1.3 NFC Communication with RFD's**

The NFC maintains regular contact with RFDs, via a listserv. They send a weekly Formation Friday activity in both English and Spanish. Formation Friday posts are shared widely in the OFS-USA, and in several countries in Latin Mexico/ Latin America /South America. Topics include Rule, Early Sources, Prayer, etc. Formation materials are available on the OFS-USA Website ([secularfranciscanusa.org](http://secularfranciscanusa.org)) and updated regularly.

### **1.4 For the Formator - Initial Formation Manual**

The NFC is currently working with the National Executive Council (NEC) on a new guide for the formator which will outline the responsibilities of the Formation Director and Team, and provide guidance for initial and ongoing formation at all levels. Expected completion is Summer of 2022.

### **1.5 New Formation Texts**

Work continues on four new initial formation texts to be published by the National Fraternity. This project will be funded in part by a grant from the Duns Scotus Formation Fund.

### **1.6 CIOFS Formation Team**

One of our NFC members works with CIOFS on formation for the Arab countries and assisted with production of the *Memoriale Propositi* videos.

## **2. Did the National Fraternity have special social projects/activities in the last year? Please give a short description.**

### **2.1 JPIC Focus Groups**

The National JPIC Commission created a Racial Equity & Inclusion Task Force, which meets monthly, for courses and book discussion groups on racial justice. JPIC Commission members also offer monthly or quarterly Focus Group virtual gatherings in four areas of interest: Immigration, Care for Creation, the Spirituality and JPIC, and Mindful Dialogue.

### **2.2 JPIC Resources**

The JPIC Commission publishes resources for Advent, World Day of Peace, Lent, Easter, Pentecost, and the Season of Caring for Creation; an annual “12 Weeks of Franciscan Peace” program; and maintains an “Animate Peace” Facebook page.

**2.3 Annual JPIC Award** – presented at annual NAFRA Chapter, honoring those who work for justice, peace and care for creation.

## **2.4 National Service Projects**

**Medicines for Venezuela and the Border:** an ongoing project since 2019, supplies health care items to Venezuela, and for those at the US border.

**H2O Project** is ongoing, with a special emphasis each Lenten season. Donated funds are contributed to organizations who serve those with little or no access to clean water.

**Charitable Giving** – annual national donation of OFS-USA funds to a number of charitable organizations nominated by Regions.

**Regional JPIC Activities:** - Each of our 30 Regions serve in a multitude of apostolates and support many charities.

## **3. Did the National Fraternity organize activities related to Youth and/or Franciscan Children in the last year? Please give a short description.**

### **3.1 Training for YouFra Animators**

In 2021, the Franciscan Youth and Young Adult (FY/YA) Commission offered an 11-week series of training sessions for YouFra animators.

### **3.2 FY/YA Progress**

The Commission's efforts are bearing fruit. We now have two officially established YouFras, four JuFras (Spanish-speaking youth fraternities) working on getting established, one Emerging JuFra and one Emerging YouFra. In their annual reports for the year 2021, Regions have reported *an increase of interest* in formation of YouFra fraternities. A good number of Regions report the appointment of Regional Chairs for FY/YA. A number of local fraternities and individual OFS members organize activities for youth or children such as coloring contests, serving meals to parish youth groups, and ministry alongside youth.

### **3.3 Promotion of Outreach to Youth**

The FY/YA Commission actively promotes outreach to youth. Recorded Zoom presentations are posted on the national website along with FY/YA formation materials and FY/YA Essential documents. Regular articles in TAU-USA report progress, offer resources, and build understanding of YouFra.

## **4. Are the materials and letters sent by the Presidency of the International Council of the OFS received regularly by the National Council? Do you use the formation material on the CIOFS website? How are these publications used? Do you have any suggestions to make?**

### **4.1 – Materials and letters from the Presidency**

We receive emails, and this information is immediately distributed to our Regions. The Minister General's letters are inspiring and formative. We frequently publish them in our national newsletter, TAU-USA, and posted on the OFS-USA Website.

### **4.3 – Notification request**

We request that CIOFS notifies national fraternities when important material is posted on the CIOFS website.

## **5. Do the National and Regional Spiritual Assistants have access to the publications of the General Spiritual Assistants? How are these publications used? Do you have any suggestions to make?**

### **5.1 Publications from the General Spiritual Assistants**

We have access to publications from the General Spiritual Assistants; however, it would be helpful to be alerted when a new issue of Koinonia, or other publications are issued or have been uploaded to the website. All communication from the General Spiritual Assistants is forwarded to our National and Regional Spiritual Assistants.

### **5.2 Communication with General Spiritual Assistants**

We appreciate that the General Spiritual Assistants are very responsive to inquiries from the CNSA.

## **6. Are the members of the Fraternities sensitive to the need for economic contributions for the support of the structures of the OFS at the various levels? Does the National Fraternity have problems covering its costs and/or the financial contribution to the International Fraternity?**

### **6.1 OFS-USA Response to Financial Needs**

Our members are very aware of the financial needs of the Order. They are generous in their support of the OFS at every level. We encourage our members to donate to CIOFS and have set up a special "CIOFS Solidarity Fund" for this purpose. We have also set aside \$20,000 to support the CIOFS Terms of Reference when those programs begin.

### **6.2 Fair Share Concerns**

We are able to cover our regular financial contribution to the International Fraternity, but we have concerns. On March 27 we sent a letter to the Presidency regarding our Fair Share contribution.

### **6.3 Request for Financial Transparency**

We appreciate the discussion at the General Chapter regarding better communication and more transparency from CIOFS in financial matters.

Please note:

**A.** Regular annual regular reporting from CIOFS's, giving details of CIOFS's income and expenses, will assist us. We want to be generous, but it is difficult to make a case for the needs of our International Fraternity without proper reporting.

**B.** In addition, an annual report of how much each national fraternity is asked to contribute, *compared* to how much they indeed have contributed. It is a matter of justice that all national fraternities contribute according to their means.

## **7. How is the contact of the National Fraternity with the Bishops and the local Church communities?**

### **7.1 Contact with Bishops and Local Church communities**

Our brothers and sisters at all levels maintain contact with the local Church and diocesan bishops in a variety of ways. Newsletters and greeting cards are sent to local Bishops. We invite the local ordinary to the annual OFS-USA National Fraternity Chapter. Direct involvement in local parish ministries is strong.

## **7.2 Building Relationships within the Wider Franciscan Family**

Our interactions with the wider Franciscan family grew stronger in 2020-2022. Members of our National Fraternity interact on a regular basis with the following organizations:

- Franciscans International
- Third Order Franciscan Federation / Executive Leadership of Franciscan Organizations (ELFO) - organized by the Franciscan Federation
- The Franciscan Family Forum – monthly gathering to build relationships and accomplish closer cooperation among the members of the Franciscan 1st, 2nd, 3rd Orders and TOR's in the USA
- Joint Committee on Franciscan Unity – building relationships with Franciscans outside of the Catholic tradition such as the Third Order Society of St. Francis (Anglican), Lutheran Franciscans, Order of Ecumenical Franciscans
- Franciscan Action Network (FAN) / and FAN Justice Circles

## **8. In regard to the last FPV report, what is the status of the recommendations' implementation by the National Council and Minister? For pending matters, please indicate any action plan, specifying implementation times.**

We have reviewed and implemented the recommendations from the 2016 Fraternal and Pastoral Visitation. We look forward to the next Visitation from CIOFS in the fall of 2023.

## **9. Did you experience grave problems in your National Fraternity? If so, please give a short description. In what way do you think CIOFS could help?**

Our National Fraternity certainly experiences challenges, but we are not faced with grave problems.

### **9.1 Challenge: Declining Number of Spiritual Assistants**

A long-term challenge, intrinsic to our times, is providing each local fraternity with a Spiritual Assistant in the face of declining numbers of vowed religious in the 1<sup>st</sup>, 2<sup>nd</sup> and TOR Orders. Many regions, in collaboration with the Friars, offer Spiritual Assistant training programs.

### **9.2 Challenge: Multicultural Inclusivity**

We are a national fraternity with a variety of preferred languages. We are meeting this challenge as follows: (1) As of 2019, we offer quarterly teleconferences for Spanish-speaking formators and Spiritual Assistants. These are hosted by our Multicultural Councilor and Formation Commission Chair, both fluent in Spanish. (2) Funds are set aside to publish translations of formation material and the national newsletter. (3) One Region has formed a "Diversity Team" and the NEC promotes this as a model for other regions. (4) With assistance from our Duns Scotus Formation Fund, one region has purchased and is utilizing translation equipment.

### **9.3 Challenge: Unity within the Order**

The polarization in our culture is reflected in a small number of our fraternities, causing partisanship and disunity. We continue to address this through formation on living the Rule, formation on JPIC and prayer for conversion of hearts.

### **9.4 Challenge: Irregular Marriages, Gender Issues**

Local fraternity councils have difficulty in responding to those who wish to join the OFS, but who are not in good standing in the Church or those OFS members who have entered

irregular marriages, or who are dealing with transgender issues. The CNSA and the NEC assist local fraternity leadership in navigating these difficult situations, encouraging dialogue and discernment. Sadly, at times, these situations result in dismissal from the Order.

At the 2019 and the 2021 Chapters the CNSA facilitated a session on “Pastoral Approaches to Difficult Subjects” to address these issues in a way that is compassionate while holding to the teachings of the Catholic Church.

### **What can CIOFS do to help?**

We are open to suggestions and appreciate your prayers.

### **10. What are the strong points of your National Fraternity?**

The brothers and sisters of the National Fraternity of the Secular Franciscan Order – USA are tremendously grateful for the many blessings and gifts we have been given. The entire National Fraternity is a hard-working and supportive whole, with many strengths. The NEC works well together and has wonderful support from the CNSA. Our talents are varied, and we find that each of us on the Council offers these talents joyfully and generously. There is a willingness to ask ourselves if we are meeting the needs of the brothers and sisters. We have set goals and are working to meet them. We listen to each other, respect each other, and are flexible in serving the Order. Our many very talented and willing servant leaders give generously of their time, and we have the means to provide many material resources for our National OFS-USA Family. Many of our members have access to current technology that enhances our communication efforts.

### **11. What else do you think is important to mention about the National Fraternity in the last year?**

#### **11.1 NEW Accessibility Committee**

An Accessibility Committee was created in 2021 to promote understanding, and provide tools and resources to make vocations accessible for all, with a particular outreach to those whose vision, hearing or mobility is impaired. Goals include: (1) Ensure accessibility for attendees of OFS events, such as the 2022 Quinquennial (2) Provide identified and available OFS resources in accessible formats (3) Raise awareness and develop tools to educate and support national committees, regions, and fraternities to assist them in recognizing the dignity and gifts of each person, and take ownership of creating access within their area of responsibility.

#### **11.2 NEC “Meet and Greet” Sessions with Newly Elected Regional Councils**

In 2020 the NEC began to schedule virtual gatherings with newly elected Regional Executive Councils. This has proved to be a great blessing for us and for the newly elected councils. Regions have begun to implement this practice with newly elected local fraternity councils.

#### **11.3 Servant Leadership / Prophetic Creativity**

We were first introduced to the topic of prophetic creativity in the Instrumentum Laboris for the 2021 General Chapter, “Animate and Guide with Servant Leadership”. Not only has this been a great topic of conversation, but we have also experienced prophetic creativity in action this past year.



#### **11.4 National Priority 2018-2022 - Fraternity Life**

Much has been accomplished this past year through virtual gatherings, but technology can never measure up to the experience of real presence - being physically present to each other. Physical presence enriches our prayer, our formation, our growth, our work. Being present to each other we can more easily interact; we can have those conversations that are so vital to fraternal life; and we can more easily grow in our understanding of each other.

But whether together virtually or physically, this past year we have seen the fruit of our national priority of fraternity life. Something that is very strong throughout our National Fraternity is our love for God and each other. This is seen in our prayer together, in the building of relationships, the increase in co-responsibility, the work and sacrifices made on behalf of the Order, the learning and growing through ongoing formation, and all the ways we are living the Gospel.

Fraternal life resources are posted on website and in TAU-USA newsletter.

#### **12. If you have special plans for the present or the next year, please give a short description.**

##### **12.1 Revision of OFS-USA Statutes**

The work on revising our National Statutes continues. The group working on this has prepared initial drafts of several sections for National Fraternity Council review.

##### **12.2 Spiritual Assistant Handbook**

The CNSA, in collaboration with the NEC, has completed the updating of certain sections of the Spiritual Assistant Handbook including the procedure for canonical establishment of a new fraternity, addressing the needs of fraternities in difficulties, and the reactivation and deactivation of fraternities. These procedures need to be included in our OFS legislation. This is an important component of our work on revising our National Statutes.

##### **12.3 Update of the English Edition of the OFS Ritual**

On behalf of the NEC, in April 2022, Fr. Jerome Wolbert OFM, CNSA President-in-turn, emailed the USA Provincial Ministers that the OFS-USA is seeking to revise the English edition of the OFS Ritual, and requested their approval. While the changes to the Ritual are likely to be small, there are several reasons for doing this now.

1. There is significant demand for Spanish and Korean translations suitable for use in our country (the official Spanish translation is for use in Spain, which requires some adjustment for the Spanish dominant in the USA). We would like to make sure the pagination matches, and that supplemental material is the same for all three languages.
2. There is a new official translation of the Ritual from the OFS (2020), with some minor changes. Any new publication would follow this new translation.
3. The English version of the Ritual (both 1985 and the proposed new edition) includes extra prayers, explanations, and supplemental material (Scriptural and Franciscan) that are not part of the official translation of the Ritual in any language. The supplemental material allows OFS members to use readings for prayer and reflection as part of the Ritual prayer, even if they do not have a Bible or Franciscan library at hand.

4. On March 28, 2022, Franciscan Media wrote to inform us that permissions for some of the supplemental material in the Ritual have expired, and the Ritual is now out of print. Franciscan Media does not intend to reprint this book. They have transferred the rights to the 1985 edition to the OFS-USA.

We will continue to keep the General Spiritual Assistants and the Presidency notified of our progress on this project.

#### **12.4 Converting the National Database to a New Platform**

The new database will have larger capacity and improved functionality, and will maintain security standards.

#### **12.5 NEW Edition of OFS Rule**

We are preparing a special “presentation copy” of our OFS Rule which will make its debut at our 2022 Quinquennial Congress. This will be a pocket size edition, (3.5 x 5.5), with rounded corners, professionally printed and bound, with raised gold stamping on a durable cover. Spanish and Korean copies will also be available.

#### **12.6 Conclusive Document of the XVI General Chapter and VII Elective Chapter 2021**

The Conclusive Document of the XVI General Chapter and VII Elective General Chapter, held in Rome between November 13 and 21, 2021, is excellent.

- We appreciate this excellent and inspiring report, and endorse the priorities that have been set for the next three years. We are delighted to see how the Holy Spirit is at work in our Order. The NEC will discuss how to disseminate the Conclusive Document among the members of the national fraternity, and will encourage our members to study it.
- The very warm and formative message of Pope Francis to the General Chapter has been published in our national newsletter, TAU-USA, along with reflection questions. The NEC will promote local discussions about the Holy Father’s message.
- We will give special attention to the newly revised Statutes of the International Fraternity (FIOFS), approved *ad experimentum*, and will report on any problem we experience when putting the Statutes into practice.
- We are grateful for the decisions made regarding detailed financial reporting on a timely basis.

In conclusion, we appreciate the support the Presidency provides. We hold you in prayer and thank God for your dedication and love of our Order. May God bless you and keep you!

Peace and all good,  
*Jan Parker and Mary Bittner*

*Jan Parker, OFS, National Minister OFS-USA*  
*Mary Bittner, OFS, National Vice-Minister OFS-USA*

*Approved by National Executive Council on May 3, 2022*