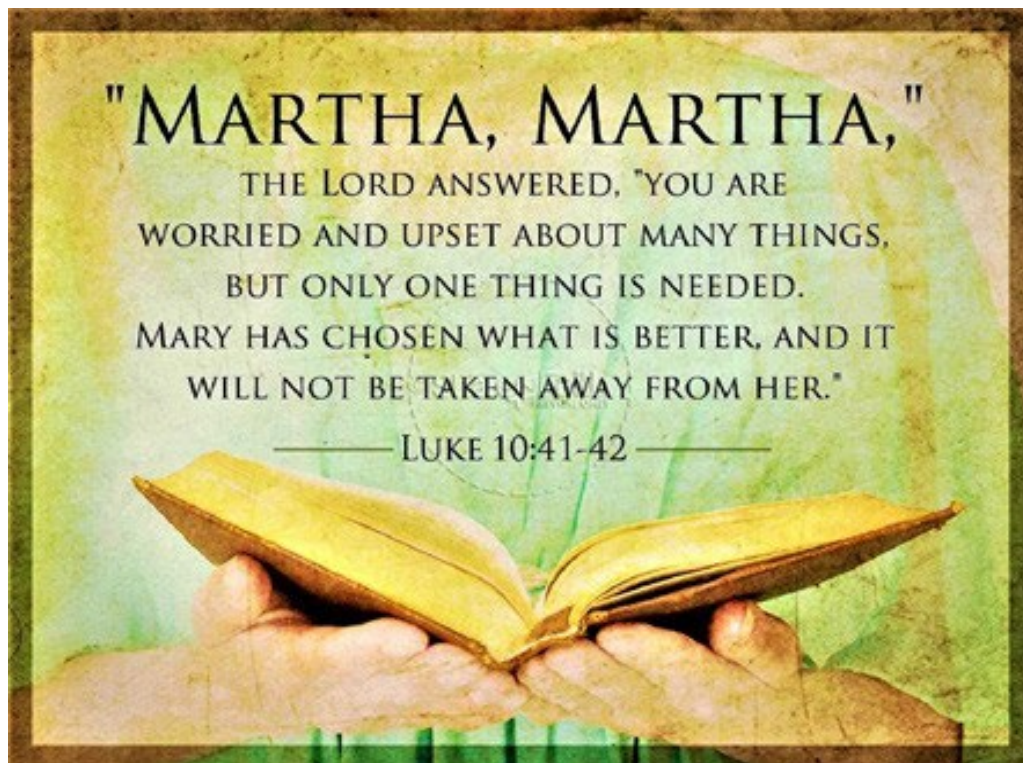


# *Regional Council Manual*

2022



All forms are available online in fillable format at  
<https://saintmargaretofcorona.org/2022-council-members-handbook/>

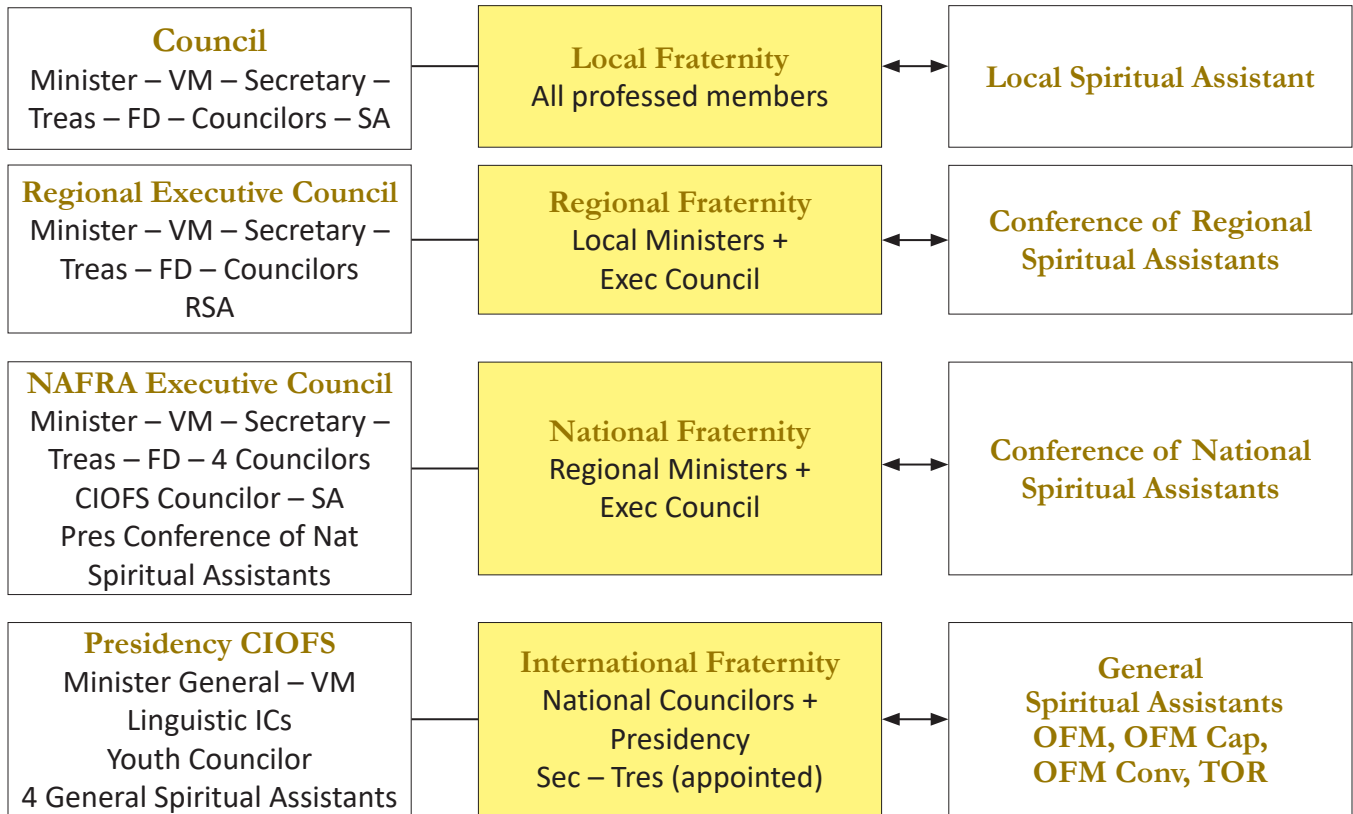
# Manual for REGIONAL COUNCIL MEMBERS

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## Structure of the Secular Franciscan Order



**For Up to Now (FUN) Manual 4-23-11**

## What Is the Regional Fraternity?

### General Constitutions, Article 61

1. The regional fraternity is the organic union of all the local fraternities existing in a territory or which can be integrated into a natural unity, either by geographic proximity, or by common problems and pastoral circumstances. It assures the link between the local fraternities and the national fraternity in respect to the unity of the OFS and in accord with the cooperative efforts of the Franciscan religious orders to provide spiritual assistance within the area.
3. The regional fraternity: — is animated and guided by council and a minister; — is ruled by the national statutes and by its own statutes; — has its own seat.

## What Is a Fraternity Council?

### General Constitutions, Article 31

1. **Rule 21** 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.

### General Constitutions, Article 49

1. The council of the local fraternity is composed of the following offices: minister, vice-minister, secretary, treasurer, and master of formation. Other offices may be added according to the needs of each fraternity. The spiritual assistant of the fraternity forms part of the council by right. (See Article. 90.2)

## What Is the Regional Council?

### General Constitutions, Article 62

1. The regional council is constituted according to the provisions of the national statutes and of its own regional statutes. At the heart of the regional council there can be set up an executive council (or board) whose duties are determined by those same statutes.
2. The regional council has the following duties:
  - a. to prepare the celebration of the elective chapter; to promote, animate, and co-ordinate the life and activities of the OFS and its insertion into the local Church within the regional area;
  - b. to detail the action plan of the OFS within the region according to the directives of the national council and in collaboration with it and to publicize that program to the local fraternities;
  - c. to communicate the directives of the national council and of the local Church to the local fraternities;
  - d. to communicate the directives of the national council and of the local Church to the local fraternities;
  - e. to provide for the formation of those responsible for animation;
  - f. to offer to local fraternities activities which support their formative and operative needs;

- g. to discuss and approve the annual report to the national council;
- h. to schedule, when circumstances recommend, the fraternal visit to the local fraternities, even if it is not requested;  
to make decisions regarding the use of available funds and, in general, to deliberate on matters regarding the financial management and the economic affairs of the regional fraternity; to have, before its term of office is finished, the regional fraternity's financial and real estate situation audited either by an expert who is not a member of the council or by the fraternity's board of examiners;
- i. to perform such other duties as are indicated by the Constitutions or necessary to achieve its own aims.

## What Makes Up a Council?

***This document should be given to each new elected council. Many new regional councilor members have little idea what is required of a local fraternity council. You may want to also send to all the fraternities in your area.***

### **Article 32 General Constitutions**

1. The ministers and councilors should live and foster the spirit and reality of communion among the brothers and sisters, among the various fraternities, and between them and the Franciscan family. They should, above all, cherish peace and reconciliation in and around the fraternity.

### **Basic Definition:**

A group of individuals who have learned how to communicate honestly with each other whose relationships go deeper than their masks of composure and who have developed some significant commitment to rejoice together, mourn together, and to delight in each other, make others' conditions our own.

A council is a group that:

- Has a sense of commitment; the willingness to coexist is crucial.
- Has learned to transcend its individual differences.
- Appreciates differences, which are celebrated as gifts.
- Arrives at decisions through consensus.

A council is realistic:

- Individuals are free to speak their minds and buck the trend.
- Incorporating the dark and the light, the sacred and the profane, the sorrow and the joy, the glory and the mud, its conclusions are well rounded.

A council is contemplative:

- A council is humble and realistic because it is contemplative.

A council is a safe place:

- The result of a safe council is that old wounds are healed, old resentments forgiven, old resistances overcome — fear is replaced by hope.
- Human beings have within them a natural yearning and thrust toward health and wholeness and holiness.

- A group of humans becomes healing and converting only after its members have learned to stop trying to heal and convert.

A council is a group that can fight gracefully:

- On the council there are no sides.
- Conflict can be resolved without physical or emotional bloodshed.

A Council is a group of all leaders:

- An essential characteristic of a council is a total decentralization of authority.
- There is a flow of leadership.

A Council is spirit.

- The spirit of true peace:  
Fraternity Council Meetings are a time to come together to deal with the business of facilitating the activities of the local fraternity.

### **Respectful Communication Guidelines**

R = take **RESPONSIBILITY** for what you say and feel without blaming others

E = use **EMPATHETIC** listening

S = be **SENSITIVE** to differences in communication styles

P = **PONDER** what you hear and feel before you speak

E = **EXAMINE** your own assumptions and perceptions

C = keep **CONFIDENTIALITY**

T = **TRUST** ambiguity because we are NOT here to debate who is right or wrong.

### **Handbook for Secular Franciscan Servant Leadership**

Every Council Member should read *Handbook for Secular Franciscan Servant Leadership* thoughtfully and often. It contains a good deal of useful information. As a suggestion, give everyone on the council a copy and assign a few pages each month. Discuss what impressed each council member the most and be sure everyone has an opportunity to speak. You can order the *Handbook* from Smoky Valley Printing found in *TAU-USA* magazine.

### **A Healthy Council Makes a Healthy Fraternity**

It is admirable to watch the constructive efforts of local councils to fulfill their calling in support of the whole fraternity. On the other hand, it is sometimes also observed that the weakness of a council leads to mediocrity or serious malaise in their fraternity – and they wonder why.



# Regional Minister

## **Article 51 General Constitutions**

1. While firmly upholding the co-responsibility of the council to animate and guide the fraternity, the minister, as the primary person responsible for the fraternity, is expected to make sure that the directions and the decisions of the council are put into practice and will keep the council informed about what he or she is doing.
2. The minister also has the following duties:
  - a. to call, preside at, and direct the meetings of the regional council; to convoke, every three years, the elective chapter of the fraternity, having heard the council on the formalities of the convocation;
  - b. to prepare an annual report to be sent to the national council after it has been approved by the council of the fraternity;
  - c. represent the [council] in all its relations with ecclesiastical and civil authorities. When the [council] acquires a juridical personality in the civil order, the minister becomes, when possible, its legal representative;
  - d. to request, with the consent of the council, the pastoral and [national] visits, at least once every three years;
  - e. to put into effect those acts which the Constitutions refer to his or her competence;

The regional minister also has the following additional responsibilities:

- to read, study and implement the Rule, Constitutions, and Statutes;
- to set setting goals, resolving issues, and accomplishing tasks for the good of the region;
- to set parameters on how the council meetings will be conducted;
- to inform the council members of their reporting responsibilities;
- to oversee that all regional council members are fulfilling their assigned duties;
- when needed, to delegate responsibilities to appropriate regional council member(s);
- along with the council, to set goals for the next three years;
- to make sure that the directions and the decisions of the regional council are put into practice;
- to keep the regional council informed concerning activities and information at the national level and inform (if needed) the local fraternities;
- to keep the regional council informed about local fraternity activities;
- to encourage area councilors to request local fraternity ministers to attend or send a local council representative to regional meetings and other regional activities;
- to ensure that communication is maintained between the region and the local fraternity;
- to ensure that TAU-USA National Newsletter and Up-to-Now Regional Newsletter are sent to local fraternities by the region's secretary or others assigned to do so;



- to make sure periodic updates are made to the region's directory of local councils;
- to convene a yearly Chapter of Ministers meeting;
- to offer a yearly regional retreat to local fraternities;
- to perform such other duties as are required by the SFO Constitutions and Statutes
- to carry out the proper purposes of the council;
- to update and maintain the Regional Minister's Binder;
- upon leaving this position, to pass the Regional Minister's Binder to the newly elected regional minister;
- to make arrangements to hand over all regional documents to the newly elected regional minister;
- as outgoing regional minister, to make him or herself available to help the incoming regional minister become acquainted with urgent and pending matters
- to hold regional council meetings at least four times a year. (If the regional minister is unable to be present at a council meeting, the meeting may be held with the regional vice minister conducting the business [see [Article 52.1\(c\) General Constitutions](#)].)

# *Regional Vice Minister*

## **Article 52 General Constitutions**

1. The regional vice-minister has the following duties:
  - a. collaborate in a fraternal spirit and support the regional minister in carrying out his or her specific duties;
  - b. exercise the functions entrusted by the council and/or by the assembly or chapter;
  - c. take the place of the regional minister in both duties and responsibilities in case of absence or temporary impediment. (*Also, see [Article 81 GC](#)*)
  - d. assume the functions of the regional minister when the office remains vacant.

### **Additional Duties:**

- read, study, and implement the Rule, Constitutions, and Statutes;
- perform such other duties as are required by the SFO Constitutions and Statutes;
- assist the regional minister upon request;
- exercise all functions assigned by the regional council;
- update and maintain the Regional Vice Minister's Binder;
- upon leaving this position, pass the Regional Vice Minister's Binder to the newly elected regional vice minister
- make arrangements to hand over all regional documents to the new regional vice minister
- the outgoing regional vice minister should make himself/herself available to help the incoming regional vice minister become acquainted with and brought up-to-date on pending matters.

# *Regional Secretary*

## **Article 52.2 General Constitutions**

2. The secretary has the following duties:

- a. compile the official acts of the regional fraternity and of the council and assure that they are sent to their respective proper recipients;
- c. provide for the communication of the more important facts to the various levels and, if appropriate, to provide for their dissemination through the mass media.

The secretary also has the following responsibilities:

- if elected, holds voting privileges and is accountable for all decisions made by the fraternity council; if appointed, does not have voting rights on the council
- compile the official minutes of regional council meetings. The council minutes are extremely important and must be maintained; they contain valuable and sometimes personal information. Every decision the regional council makes should be documented

This is especially true:

1. In the event one of the council members resigns, the council must vote on his or her replacement. This must be documented in the minutes as above. A council member who has been appointed in this manner does not have voting rights.
2. Many discussions and decisions made by the council are confidential and should be kept confidential. Be discreet in speech and keep this part of the meeting separate from the council meeting minutes.

## **Additional Guidelines**

- keeps attendance records at regional council meetings
- assists the regional council with general communications
- assists in sending announcements of upcoming events, meetings, or other regional activities
- forwards to the Regional Database Manager, Mary Lou Coffman, [marylousfo@gmail.com](mailto:marylousfo@gmail.com) documents such as newly received, newly professed, deaths, withdrawals, and transfers, etc., received from the local fraternity
- to ensure that *TAU-USA* National Newsletter and *Up to Now* Regional Newsletter are sent to local fraternities through the region's secretary or others assigned to do so
- updates and maintains the Regional Secretary's Binder
- upon leaving this position, passes the Regional Secretary's Binder to the newly elected regional secretary
- makes arrangements to hand over all regional documents to the new regional secretary
- is available to help the newly elected regional secretary become acquainted with his or her new position on the regional council



## RECORD KEEPING

It is the responsibility of the outgoing council and minister to meet with the incoming council and minister to turn over all records. The new council and minister should determine the principal location of the documents and records so the regional councilors can readily access that information. Those records should be kept in a safe place and include:

1. Document of canonical establishment
2. Ritual
3. Rule
4. General Constitutions
5. National Statutes
6. A file containing guidelines for:
  - Elections, local and regional
  - Duties of Councilors
  - Reports to National and Region
7. History of the Region
8. Up-to-date inventory of all equipment that belongs to the region, such as computers, office furniture, and miscellaneous supplies

It is also considered essential to keep files for:

- Correspondence by date
  - Formation material
    - Guidelines Initial Formation published by the National Formation Commission
  - Up-to-date record of formation procedures including texts used
  - Information for the National Database
9. It is the duty of the regional councilor and minister to see that each local fraternity has an up-to-date register of the brothers and sisters, which includes:
    - Information for the National Database
    - Date of admission
    - Date of profession
    - Date of transfer, including fraternity of origin and destination
    - Date of death

(Fraternal visitors will check this register)

### **HARDBACK BINDERS ARE RECOMMENDED FOR:**

- Minutes of council meetings
- Ledger showing income, expenses, and balance and treasurer's reports
- Formation material



# *Regional Treasurer*

## **Article 52.4 General Constitutions**

4. The treasurer, or bursar, has the following duties:

- a. to guard diligently the contributions received, recording each receipt in the appropriate register, with the date on which it was given, the name of the contributor, or the one from whom it was collected;
- b. to record in the same register the items of expense, specifying the date and the purpose, in conformity with the directions of the regional council;
- c. to render an account of his or her administration to the regional council according to the norms of the national statutes.

The treasurer also has the following additional responsibilities:

- if elected, holds voting privileges and is accountable for all decisions made by the fraternity council
- if appointed, has no voting rights (see *NAFRA Statutes*)
- presents an annual budget for conducting the business of the regional council
- all payments are to be made by check, recorded in an accurate ledger
- expenditure of funds must be approved by the council in advance
- ensures the deposit of all funds into such bank accounts in the name of the region and keeps an accurate ledger
- maintains a yearly calendar showing monthly payouts and future activity events for which the regional council will need to provide funding. This calendar will help the newly elected regional treasurer after regional council elections have taken place
- presents an up-dated financial report at each regional council meeting showing current expenses, income, and checkbook balance
- appropriate forms for reporting the financial health of the regional council can be found at: <https://secularfranciscansusa.org/guidelines-forms-other-resources/>
- submits a financial report and the bank account register for approval at regular intervals as decided upon by the regional council
- provides the regional council a year-end report showing receipts, expenditures and balances in the treasury for the year
- receives from local fraternity treasurers their Fair Share assessment from the fraternity's Common Fund
- is available to answer questions when a local fraternity is planning to have an audit of their treasurer records
- sends the assessed fair share to the National Treasurer once a year
- receives by the end of the year a current report of candidates and professed from each local fraternity treasurer
- at a national visitation provides a stipend to both the pastoral visitor and national visitor, if approved by the regional council

- keeps a copy of, and updates if necessary, the region's Tax ID
- updates and maintains the Regional Treasurer's Binder
- upon leaving this position, passes the binder to the newly elected regional treasurer
- makes arrangements with the newly elected treasurer and new regional minister to meet at the bank holding the region's checking account to sign signature cards. At this time the past treasurer will hand over all documents pertaining to this position
- takes the following to the bank:
  - a. IRS Determination Letter
  - b. An up-to-date letter from National stating – "St. Margaret of Cortona Region is a 501 (c) (3) Organization"
  - c. EIN Number
  - d. Articles of Incorporation
  - e. Latest Elections jReport (Original)

## FAIR SHARE

### **Candidates, Professed and Excused Members**

Each year the fraternity treasurer makes the fraternity's "Fair Share" payment to the regional treasurer. The amount for each candidate and professed member varies in the different regions in the United States. The Fair Share is paid from the monthly Common Fund received at each gathering. If a candidate or professed member is unable to attend the gathering for more than a month, that person is asked to mail his/her Common Fund contribution to the local fraternity treasurer.

### **Article 30 General Constitutions**

2. **Rule 25** In a family spirit, each brother and sister should make a contribution to the fraternity fund, according to each one's means, to provide the financial means needed for the life of the fraternity and for its religious, apostolic, and charitable works. The brothers and sisters ought to 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.

### **Article 18 NAFRA Statutes**

7. The Local Fraternity is responsible for contributing to the Regional Fraternity on a fair share basis from its common fund to underwrite the costs of that fraternity [cf. General Constitutions, Article 30 .3]. A fair share contribution is made based on the number of active and excused brothers and sisters, but not for those who are deemed lapsed.
  - a. An active fraternity member is one who participates both by attending fraternity meetings and by providing financial support to the community, or whom the fraternity has excused from such obligations.



**St. Margaret of Cortona Regional Fraternity**  
**OFS Financial Assistance Fund Request**  
**Form**  
**For Regional Events**

The Regional Executive Council created Financial Assistance Fund to aid active professed members to attend any Regional planned events (i.e., Day of Reflection, Annual Chapter Retreat, Chapter of Mats, Formation Directors Weekend, Chapter of Ministers, and other regional events). Financial Assistance Fund will cover part or all of registration fee and will not cover travel / transportation.

Steps are as follow:

- Local fraternity's active professed member requesting assistance will first discuss with their minister.
- Local fraternity's minister will fill out this form, sign and forward to the regional minister.
- The regional minister and/or Regional Executive Council will review.
- If approved, the regional minister will inform both regional treasurer and local minister.
- If disapproved, the regional minister will inform local minister.

Name of Professed Member: \_\_\_\_\_

Name of Local Fraternity: \_\_\_\_\_

Year first professed: \_\_\_\_\_

Active Professed:    ☐ Yes    ☐ No

Name of regional event for which Financial Assistance Fund requested:  
\_\_\_\_\_

What circumstances caused this professed member to ask for financial assistance (brief statement only) \_\_\_\_\_

Amount of Financial Assistance Fund requesting (Note: the amount should not exceed the cost of registration.) \_\_\_\_\_

Total Cost \$ \_\_\_\_\_

Contribution Amount: Participant \$ \_\_\_\_\_

Local Fraternity \$ \_\_\_\_\_

Amount requested from the Region \$ \_\_\_\_\_

Requested by: \_\_\_\_\_

Name of Local Fraternity's Minister / Signature / Date

Below for Regional Minister use only

☐ Approved    ☐ Disapproved    Amount if approved: \$ \_\_\_\_\_

\_\_\_\_\_  
Regional Minister Name / Signature / Date

*St. Margaret of Cortona Region  
Audit Questionnaire for Fraternity Financial Records*

*Fraternity Treasurer:* \_\_\_\_\_

*Fraternity Name/Location:* \_\_\_\_\_

*Date of Audit:* \_\_\_\_\_

**1. ARE RECORDS KEPT ELECTRONICALLY? Note: If no, skip to #2    ☐ Yes   ☐ No**

- a. What application/software is used? \_\_\_\_\_
- b. How frequently are backups done? \_\_\_\_\_
- c. Where are backups stored? \_\_\_\_\_
- d. Do you have online access to bank accounts?   ☐ Yes   ☐ No  
If so, who else is allowed access? \_\_\_\_\_
- e. Is the bank reconciliation process automated within the application/software?  
☐ Yes   ☐ No

**2. ARE RECORDS FOR THREE YEARS PRESENT?**

- a. Treasurer's report (form available on NAFRA website)?   ☐ Yes   ☐ No
- b. Check register   ☐ Yes   ☐ No
- c. Invoice for each bill paid or expense report from members submitting for reimbursement.  
☐ Yes   ☐ No

If so, what is the approval process? \_\_\_\_\_

- d. Bank Statement for each bank account (see Treasurer's report for number of accounts to expect).   ☐ Yes   ☐ No
- e. Bank Reconciliations   ☐ Yes   ☐ No
- f. Letter from the Federal government assigning the region a Federal Identification Number  
☐ Yes   ☐ No

If records are not present, what reason is given? \_\_\_\_\_

**3. REVIEW THE CHECK BOOK REGISTER:**

- a. Do all payees appear to be related to Local/Regional business?   ☐ Yes   ☐ No
- b. Is a monthly reconciled balance noted in the register?   ☐ Yes   ☐ No
- c. Are all check numbers accounted for?   ☐ Yes   ☐ No

**4. BANK STATEMENTS:**

Select two monthly bank statements for each bank account in each year reviewed. (e.g., for three years for one account there will be six different bank statements reviewed.

- a. For EACH monthly bank statements selected, has the bank statement been reconciled?  
☐ Yes   ☐ No

If not, explain reason given. \_\_\_\_\_

- b. For EACH bank statement selected, does the reconciled balance from the bank statement agree to the reconciled balance in the check register.   ☐ Yes   ☐ No

If not, explain reason given. \_\_\_\_\_

- c. For EACH bank statement selected, trace deposits listed to deposit slip. Do these amounts agree?   ☐ Yes   ☐ No

If not, explain reason given. \_\_\_\_\_

d. For EACH bank statement selected, trace the checks that cleared the bank to the source documents. Is there an invoice, expense report, or some document that explains why the check was written? ☐ Yes ☐ No

If not, explain reason given. \_\_\_\_\_

e. Is the invoice marked paid with the date and check number? ☐ Yes ☐ No

If not, explain reason given. \_\_\_\_\_

5. **CONTRIBUTIONS RECEIVED:**

a. Do deposits document source of the receipt? ☐ Yes ☐ No

b. Is there a register or some document that lists the amount each fraternity has given monthly?  
☐ Yes ☐ No

6. **REPORTS:**

a. Are annual financial reports made to the Regional Treasurer? ☐ Yes ☐ No

b. Are regular financial reports made available to the Council and fraternity members?  
☐ Yes ☐ No

If so, how? \_\_\_\_\_

c. Is a budget prepared on an annual basis? ☐ Yes ☐ No

If so, how is it reviewed and approved? \_\_\_\_\_

7. **NON-FINANCIAL ASSETS:**

a. Does the fraternity have any non-financial assets (real estate, bond/stock certificates, etc)?  
☐ Yes ☐ No

If so, how and where are records of those assets kept? \_\_\_\_\_

8. **LOCATION OF RECORDS:**

a. Checkbook, register and blank checks \_\_\_\_\_

b. Records of contributions and disbursements \_\_\_\_\_

c. Record of receipts for reimbursements \_\_\_\_\_

d. Monthly and annual reports \_\_\_\_\_

e. Account Reconciliations \_\_\_\_\_

f. Account numbers and passwords \_\_\_\_\_

**Printed Name and Signature of members reviewing records**

**Name**

**Signature**

**Date**

_____	_____	_____
_____	_____	_____

**ADDITIONAL COMMENTS:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### *Steps for Reviewing Fraternity Financial Records*

Fraternity Name/Location: \_\_\_\_\_

Fraternity Treasurer: \_\_\_\_\_

Date of Audit: \_\_\_\_\_

Person Performing Audit: \_\_\_\_\_

**1. Fraternity Bank Accounts:**

Please list the institution(s), account number(s), account name(s), authorized signature(s) and their position on the Council

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Name: \_\_\_\_\_

Authorized Signature(s): \_\_\_\_\_

Institution Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Name: \_\_\_\_\_

Authorized Signature(s): \_\_\_\_\_

**2. How and where are the fraternity's financial records kept?**

\_\_\_\_\_  
\_\_\_\_\_

**3. If electronic records are kept, how frequently are backups done, and where are they stored?**

\_\_\_\_\_

**4. If electronic records are kept, what software is used (including version)?**

\_\_\_\_\_

**5. Is there a record of each receipt, including the date and name of the contributor?**

☐ Yes ☐ No

**6. Is there a record of each expense/disbursement, including date and purpose?**

☐ Yes ☐ No

**7. Who counts and deposits Common Fund and other contributions?** \_\_\_\_\_

\_\_\_\_\_

**8. Are contributions deposited in a timely manner?** ☐ Yes ☐ No

**9. How are checks endorsed?** \_\_\_\_\_

**10. Who receives/opens fraternity mail?** \_\_\_\_\_

\_\_\_\_\_

11. Are bank accounts reconciled monthly?    ☐ Yes   ☐ No

12. Does the fraternity have a petty cash account?    ☐ Yes   ☐ No

13. If there is a petty cash account, what are the petty cash procedures? \_\_\_\_\_

\_\_\_\_\_

14. What are the approval procedures for expenditures? \_\_\_\_\_

\_\_\_\_\_

15. Are regular financial reports made available to the Council and fraternity members?

?    ☐ Yes   ☐ No    If so, how? \_\_\_\_\_

\_\_\_\_\_

16. Are annual financial reports made to the Regional Council? ?    ☐ Yes   ☐ No

17. Are treasurer's records kept for at least six years?    ☐ Yes   ☐ No

18. Does the fraternity have treasurer's procedures specific to the accounts and responsibilities and needs of the fraternity?    ☐ Yes   ☐ No

19. Does the fraternity have any non-financial assets (real estate, bond/stock certificates, etc.)?    ☐ Yes   ☐ No.    If so, how and where are records of those assets kept?

\_\_\_\_\_

20. Location of Records: \_\_\_\_\_

Check book, register and blank checks \_\_\_\_\_

\_\_\_\_\_

Records of contributions and disbursements \_\_\_\_\_

\_\_\_\_\_

Record of receipts for reimbursements \_\_\_\_\_

\_\_\_\_\_

Monthly and annual reports \_\_\_\_\_

\_\_\_\_\_

Account reconciliations \_\_\_\_\_

\_\_\_\_\_

Account numbers and passwords \_\_\_\_\_

\_\_\_\_\_

21. If members are reimbursed for expenses, what is the procedure? Are adequate receipts and approvals maintained? \_\_\_\_\_

\_\_\_\_\_

22. Is online access available to bank accounts?    ☐ Yes   ☐ No

If so, who is allowed access? \_\_\_\_\_

\_\_\_\_\_

23. Is a budget prepared on an annual basis? ☐ Yes ☐ No.

If so, how is it reviewed and approved? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

24. Is at least one other Council member (besides the treasurer) aware of the location of all records, and have access to bank accounts?    ☐ Yes    ☐ No

25. Is there any evidence in the account statements of overdrafts?    ☐ Yes    ☐ No

26. Is there any evidence in the account reconciliations or check register of unexplained adjustments or errors in bookkeeping?    ☐ Yes    ☐ No

**Auditor's Recommendations:**

[illegible]

Other Comments:

[illegible]

Auditor's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# *Regional Formation Director*

## **Article 52 General Constitutions**

3. The master of formation has the following duties:

- a. to co-ordinate, with the help of the other members of the council, the formative activities of the fraternity;

The regional formation director also has the following additional responsibilities:

- if elected, holds voting privileges and is accountable for all decisions made by the regional fraternity council
- if appointed, does not have voting rights on the council
- coordinates, with the help of the other regional council members, the formation program for local fraternity formation directors
- when needed calls the local formation directors for meetings and workshops
- works with regional spiritual assistants and the formation team in developing formation programs for local fraternities
- ensures that local fraternity formation directors obtain documentation such as Baptism Certificate, annotated with other sacrament dates are received from the inquirers. Inquirers need two letters of recommendations, one being from the inquirer's pastor; all are to be received before the "Rite of Admission." If married, provide verification of validity, Decree of Nullity, if applicable, if ordained, provide copy of letter verifying faculties. (See The FUN Manual – For the Formator 3-23-2011 – Page 18 of 26)
- sees that all local fraternity formation directors have The FUN Manual. This is a great resource for both initial and ongoing formation; make sure the members of the regional formation team become familiar with its contents. Ongoing formation materials such as Handbook for Secular Franciscan Servant Leadership can be purchased at Smoky Valley Printing found in the TAU–USA national newsletter.
- ensures that local fraternity spiritual assistants are involved in the formation process in both initial and ongoing formation instruction
- updates and maintains the Regional Formation Director's Binder
- upon leaving this position, passes to the newly elected the Formation Director's Binder and *The FUN Manual*
- makes arrangement to hand over all regional documents to the new regional formation director
- is available to help the new formation director become acquainted with his or her new position on the regional council



## For Up to Now (FUN Formation Manual)

### Creation of Confidential File Folder for Each Prospective Member:

- “NOTE: It is recommended that all information forms, sacrament records, interview observations, correspondence, letters of recommendations and other notes be kept in a confidential file folder for each prospective member. This will help the Fraternity Council in their discernment process.” *For the Formator* – page 15 of 26

### Faith Inventory:

- “A faith inventory or assessment is made. The prospective member must be a fully initiated Catholic, having received the Sacraments of Baptism, Eucharist, and Confirmation and in good standing in the Church.” *For the Formator* – page 15 of 26

### Orientation:

- Following an initial interview and faith inventory a prospective member begins Orientation.” (The St. Joseph Cupertino Fraternity waits until a visitor has made three consecutive visits.)
- Orientation is a time for determining a person’s interest, eligibility, and disposition to enter the initial formation process.
- The time spent in Orientation should be sufficient to adequately cover the foundational topics outlined in *For Up to Now* (Formation Manual) and not less than three months. *For the Formator*, page 15 of 26

### Sacramental Documents Required:

- Baptism Certificate (Annotated with other sacrament dates)
- First Communion Certificate
- Confirmation Certificate
- Marriage Certificate (Decree of Nullity, if Applicable)
- If ordained provide copy of letter verifying faculties
- Two Letters of recommendation, one being from the Inquirer’s pastor. (Please provide the names and addresses of your pastor or spiritual director and another person to serve as character reference). *For the Formator*, page 18 of 26

# Regional Area Councilors

The area councilors have the following responsibilities:

- if elected by the local fraternity ministers or delegates at the time of the regional elections, hold voting privileges
- the regional council may appoint councilors as deemed necessary, with no voting rights
- the area councilor is accountable for all decisions made by the regional fraternity council
- follow through on jobs assigned
- within a reasonable time frame, area councilors are to prepare a spreadsheet of upcoming fraternal visitations and elections and forward to the regional minister. At the end of each year, regional area councilors will create a spreadsheet for the new year and forward to the regional minister
- at the request of local fraternities, regional area councilors conduct regional visitations
- if a fraternal visitation is due and regional council has not received a request from the local fraternity, the area councilor will contact the fraternity minister
- if the local fraternity minister has not attempted to contact a regional spiritual assistant to conduct a regional pastoral visitation, the area councilor will take on this responsibility
- at the time of the fraternal visitation, the area councilor must see a copy of the fraternity's canonical establishment and a copy of the latest audit report
- if a local fraternity appears to be in trouble, the area councilor will conduct an emergency regional visitation with a request to a regional spiritual assistant to conduct a regional pastoral visitation
- the local fraternity minister will call a chapter of elections for their fraternity every three years. The outgoing minister cannot be elected to the vice minister's position after leaving the minister's position
- if elections are due and the council has not received a request from the local fraternity, the area councilor will contact the fraternity minister
- if the local fraternity minister has not attempted to contact a regional spiritual assistant to witness the elections or a delegate has not been assigned, the area councilor will take on this responsibility
- regional area councilors are responsible for sending the *Council Members Handbook* to newly elected fraternity council members
- collaborates with the regional council in determining areas of needs at the local fraternity level
- accurate and organized records should be maintained of all communication regarding assigned duties in their area jurisdictions
- notations or short summaries of important conversations or actions should be kept in a file for future reference
- regional area councilor, once a year, should call a meeting with the local fraternity ministers in their jurisdiction. Calling a yearly meeting could save some headaches later down the road
- maintain a Regional Councilor's Binder
- upon leaving this position, pass the Regional Councilor's Binder to the newly elected regional area councilor for the assigned area jurisdiction
- make arrangements to hand over all regional documents to the new area councilor
- be available to help the new area councilor become acquainted with his or her new area jurisdiction

## FRATERNAL VISITATION

While details of visitations may vary between regions, it is important that both fraternal and pastoral visitors attempt to accomplish the purpose assigned to their visit. It is in this spirit that the guidelines, that follow, are offered. A region can adopt them with the confidence that visits using the guidelines will offer balanced service to fraternities. Prayerful consideration and implementation of its phases can gain the full value of fraternal and pastoral visits.

**Preparation:** Well before a visit the minister together with the council should thoughtfully and prayerfully conduct a fraternal self-evaluation. We include a pre-visitation questionnaire for this purpose. The completed questionnaire should be sent to the visitors at least two weeks before the actual visitation so the visitors can make the best preparation.

**The Visit:** The fraternity must allow enough time for the visitors to go over the appropriate material. Time needs to be given to the meeting of the fraternity council with the two visitors and to the meeting of the assembled local ministers with the visitors.

**During the Visitation:** Before and after the gathering of the fraternity, time should be allowed for the visitors to meet with the council as a group and with the minister. The regional visitors will be present at the gathering to observe and evaluate. Time should be allowed for the visitors to address the fraternity.

**Evaluation:** The visitors will look at the following services and methods:

- Spiritual growth, prayer, and liturgy
- How needs are communicated and met
- Communication with the fraternity
- Description of both initial and ongoing formation programs including text used
- Vocation promotion methods

Proper recording and accounting for the fraternity's common fund. The regional visitor will review the following:

- a. Canonical documentation
- b. Letter from Provincial the fraternity is bonded to
- c. Minister's binder
- d. The fraternity register
- e. The secretary's minutes for the last three years
- f. The treasurer's bank statements and ledger
- g. The formation director's binder of notes, inquirer and candidate attendance records and use of the *FUN Manual*

**The Report:** After the visitation the fraternity will receive a written report from the visitor. Implementation of recommendations is a sign of true growth and cooperation.

What happens before and after the visits themselves are in many ways as important as the visit. The council needs to review the report and try to carry out the recommendations given.



# Guidelines for the Fraternal Visitation of a Local Fraternity

## Title VI The Fraternal Visitation

### Article 92 General Constitutions

1. **Rule 26** The purpose of both the pastoral and fraternal visits is to revive the evangelical Franciscan spirit, to assure fidelity to the charism and to the Rule, to offer help to fraternity life, to reinforce the bond of the unity of the Order, and to promote its most effective insertion into the Franciscan family and the Church.
2. With the consent of the appropriate council, the request for the fraternal visit as well as for the pastoral visit is made:
  - a. by the minister of the local and regional fraternity, at least every three years, to the council of the immediately higher level and to the respective conference of spiritual assistants;
  - b. by the national minister, at least every six years, to the Presidency of the International Council of the SFO and to the conference of general assistants;
  - c. by the general minister, at least every six years, to the Conference of General Ministers.
3. For urgent and serious reasons or in case of failure on the part of the minister or the council to request it, the fraternal and pastoral visit may be carried out upon the initiative of the respectively competent council or conference of spiritual assistants.

### Article 93 General Constitutions

1. In the visits to the local fraternity and to the councils at the various levels, the visitor will verify the evangelical and apostolic vitality, the observance of the Rule and Constitutions, and the insertion of the fraternities into the Order and into the Church.
2. In the visits to the local fraternities and to the councils at the various levels, the visitor will in time communicate the object and the program of the visit to the interested council. He or she will examine the registers and the records, including those relative to the preceding visits, to the election of the council and to the administration of goods.

The visitor will draw up a report of the visit carried out, appending it to the records in the appropriate register of the fraternity visited, and will inform the council of the level which has held the visit.
3. In the visit to the local fraternity, the visitor will meet with the entire fraternity and with the groups and sections into which it is divided. He or she will give special attention to the brothers and sisters in formation and to those brothers and sisters who may request a personal meeting. Where required, he or she will proceed to the fraternal correction of the shortcomings eventually encountered.
4. If it is useful for the service of the fraternity, the two visitors, secular and religious, may make the visit at the same time, agreeing beforehand on the program, in a way most consonant with the mission of each of them.
5. The fraternal and pastoral visits, carried out by the immediately higher level, do not deprive the visited fraternity of the right to appeal to the council or to the conference of spiritual assistants of a higher level.

#### **Article 94 General Constitutions**

1. The fraternal visit is a moment of communion, an expression of the service and concrete interest of the secular leaders at the various levels, so that the fraternity may grow and be faithful to its vocation.
2. Among the various initiatives to achieve the purpose of the visit, the visitor will give special attention:
  - to the validity of the formation, both initial and permanent;
  - to the relations entertained with other fraternities at the different levels, with Franciscan youth, and with the entire Franciscan family;
  - to the observance of the directives and of the guidelines of the International Council of the SFO and of the other councils;
  - to the presence in the local Church.
3. The visitor will check the report of the previous audit or verification of the financial and property management of the Council, the register of the accounts and every document pertaining to the property of the fraternity and, if applicable, the condition of the juridical personality in the civil order, including the fiscal aspect. In absence of the required audit of the financial and property management of the council, the visitor can commission such an audit, to be paid by the visited fraternity, to an expert who is not a member of the council concerned. Wherever he or she deems it opportune, the visitor will obtain the assistance of a competent person in these aspects.
4. The visitor will check the records of the election of the council. He or she will evaluate the quality of the service offered to the fraternity by the minister and by the other leaders and will study with them the solution to problems which may arise. If, for whatever reason, he or she should find that their service does not meet the needs of the fraternity, the visitor will promote appropriate initiatives, taking into account also the provisions concerning resignation and removal from office, given special circumstances.
5. The visitor may not carry out the visit of his or her own local fraternity, nor of the council of another level of which he or she is a member.

Rita Colleran, OFS, gave permission to use this letter.

## Request for Fraternal Visitation

### **Article 51 General Constitutions**

2. The minister also has the following duties:
  - a. to request, with the consent of the council, the pastoral and fraternal visits, at least once every three years.

**NOTE:** The fraternity minister should contact the regional area councilor to request a fraternal visitation. The pastoral visitation request should be made to the next higher level (Regional Council of Spiritual Assistants) and should be directed to the regional spiritual assistant to which the fraternity is bonded. Do not hesitate to contact your regional area councilor for assistance if needed.

### **Article 14 Statutes for Spiritual and Pastoral Assistance to the OFS**

4. It is recommended that the pastoral and fraternal visits be carried out together with agreement beforehand on the program. The visitor or visitors will in good time communicate the object and the program of the visit to the council concerned. (Most of the following is done by the fraternal visitor) They will examine the registers and the records, including those relating to previous visits, to the election of the council and to the administration of goods. They will draw up a report of the visit they have conducted, seeing to it that it is appended to the proper records of the fraternity visited. They will send a report to the Minister and/or secretary of the council of the level which has conducted the visit. The post-visitation report is also sent to the Provincial Spiritual Assistant of the fraternity visited (the Order to which the fraternity is bonded.)

## **When Should the Local Fraternity Council Invite Regional Assistants? .**

### **IT NEEDS PERIODIC CHECK-UPS:**

The fraternity minister and council have the responsibility of inviting the Regional Spiritual Assistant and the appropriate Regional Executive Council Member to local fraternity meetings and to council meetings. A triennial visitation is required, but more frequent “check-ups” are desirable.

The Regional Executive Council is the bond connecting the fraternity with the broader Franciscan entity. It’s becoming more and more imperative to strengthen this bond in our day, when so many exciting things are happening.

Have you scheduled your fraternal visitation with your area councilor for the year? When was your last one? What topics would you like the visitor to address? How will you communicate your local needs and concerns?

Another form of check-up is peer communication with members from other fraternities. Sharing experiences multiplies enthusiasm.

Are you on the mailing list for other fraternity newsletters? Do you receive the national newsletter, the *TAU-USA*? ([secularfranciscansusa.org/tau-usa-newsletter/](http://secularfranciscansusa.org/tau-usa-newsletter/))

When was the last Day of Recollection or weekend retreat for your fraternity? If you feel your group is too small for an endeavor like this, have you considered joining with a neighboring fraternity to sponsor one?

Members of the Regional Council will be glad to help you make arrangements. An opportunity for annual or bi-annual reflection should be offered to all Secular Franciscans. Is the council doing its own “ongoing formation” by working through one of the many checklists available, or have council meetings become the dry bones of business busyness? Are you rotating the responsibility for council input, or has one person been handling it alone?

Have you polled the members about current concerns?

### **WHEN TO CALL THE DOCTOR:**

Just like the human body, the fraternity’s body sometimes signals its ill health. Contact your Regional Council Member or Regional Spiritual Assistant if your fraternity and your local assistant can’t seem to shake these symptoms:

The feeling of malaise; dryness; being stuck in a rut with your gathering format, programs, materials or even prayer types. (Antidote: variety; creativity; courage to experiment; examples from other fraternities.)

Factions; power struggles; competition, envy; officers or members trying to exercise authority inappropriately. (Antidote: attention to communication skills; outside mediation; conflict resolution; group reconciliation service.)

Lack of new vocations for prolonged periods of time or older members deciding to lapse. (Antidote: evangelization; attention to the image projected by the group; change in leadership; renewed enthusiasm.)

One person doing everything. (Antidote: honest discussion by council; renewal of commitment; reevaluation of priorities of group; teaching on giftedness.)

Difficulty in accepting our Rule (1978) or accepting changes in formation or other policies aimed to address the life of the Order and the needs of the Church. (Antidote: education; gentleness; outside speakers; attendance at regional and national meetings.)



Considering all this, would you say there's any easy "formula" to follow in guiding your fraternity "from Gospel to life and life to Gospel?"

The answer, of course, is a resounding "No!" Praise God that this is so.

Another story about Francis – who taught the world that Brother Sun praises God by being uniquely Brother Sun, and Sister Moon by being Sister Moon – tells why:

It seems that the early friars were caught up one day discussing the question, "Who is the 'perfect friar'?" Francis put a stop to this seed of competition and comparison by looking around the room and pointing to each person present.

Brother Angelo was the perfect friar for his courtesy, Francis said. And Brother Masseo for his natural good sense. Brother Leo was the perfect friar for his simplicity. Brother Bernard for his faith. Brother Juniper, for his patience. Brother John of Lauds for his sheer physical strength... and so Francis continued, pointing to each friar in turn. The message is clear.

The more completely we help each other offer our uniqueness to God, the more truly He is praised.

Francis did what was uniquely HIS to do. And as he lay dying, he blessed all of us with the challenge: "May Christ teach you what is yours." (Omnibus, 739)

These are just some of the ideas and signs to consider in helping you evaluate the life of both your council and fraternity. Some are mentioned more than once – they are important and have borne fruit when councils have had the courage to actively animate and guide and be more engaged. So again, congratulations on your election and please consider yourself a blessing to the sisters and brother who called you forth, love and support them and expect the same back from them for your gift of yourself!

Original:

- Page Zyromski SFO
- John Petrikovic, OFM Cap

Updated 2010:

- Cyl Maljan, OFS

2011

- Robert Fitzsimmons, OFS

NAFRA Formation - Care and Feeding of Councils

## Sample Letter

### When a Fraternity Fails to Request a Regional Visitation

[Insert Ministers Name, Fraternity Name]

Your Regional and Pastoral Visitations are due. Please contact me so we can set up a schedule for both visitations to take place.

If you have not contacted the Regional Spiritual Assistant to which your fraternity is bonded for a Pastoral Visitation, please do so as soon as possible. The region prefers to hold both the Regional Visitation and the Pastoral Visitation at the same time. This is not mandatory, but it is more convenient for all participants.

The Regional Spiritual Assistant for the province to which your fraternity is bonded is: [List the name, home address, e-mail address and telephone number of the regional spiritual assistant to which the fraternity is bonded].

[Insert area councilor's name and title]

Note to Area Councilor: If the regional spiritual assistant cannot be present for the pastoral visitation at the time of your regional visitation, the pastoral visitation must be rescheduled, or the bonded regional spiritual assistant may delegate another to conduct the pastoral visitation.

## Fraternal Visitation Preparation Information

“The local fraternity “should be the privileged place for developing a sense of Church and the Franciscan vocation and for enlivening the apostolic life of its members.” (SFO Rule, Article 22)

“The fraternal visit is a moment of communion, an expression of the service and concrete interest of the secular leaders at the various levels, so that the fraternity may grow and be faithful to its vocation.” (*General Constitutions, Title VI, Article 94*)

Dear Fraternity Minister and Council:

As you are aware, we have scheduled a Fraternal Visitation by the Regional Area Councilor for your fraternity on [Date]. With this letter and attached documents, I hope that you will be fully prepared for a successful visitation.

Among the various initiatives to achieve the purpose of the visit, special attention will be given:

- To the validity of the formation, both initial and permanent;
- To the relations entertained with other fraternities at the different levels, with Franciscan youth, and with entire Franciscan family;
- To the observance of the Constitutions, the Statutes, and the regional guidelines;
- To the fraternal presence in the host Church, Monastery, organization, etc.;
- To the state of the bond of unity of the Order, i.e., to deepen the fraternity’s dialogue and cooperation with the Region; and
- To dialogue and collaboration with the fraternity Council and the individual members.

A Fraternal Visit takes place in three stages:

**Preparation:** The Council and members should thoughtfully and prayerfully conduct a self-evaluation as they prepare for the Fraternal Visitation. The Pre-Visitation Questionnaire provides most of the information necessary to assist the visitors, but we’d like to hear from the individual Council members as well. Included with this preparation information you will find:

- a. **Guidelines for the Fraternal Visitation of a Local Fraternity** developed by a collaborative effort of Conference of Spiritual Assistants and the National Fraternity to help ensure a productive visitation;
- b. **Fraternity Minister Checklist** for the minister to use as needed;
- c. **Pre-Visitation Questionnaire** to be completed by the council jointly and returned to the visitor no later than two weeks before the visit;
- d. **Fraternity Council Self-Evaluation** to be completed by each council member individually, returned to visitor two weeks prior to visit.

The visitor will review any previous audit or verification of the financial and property management of the Council, the register of the accounts and every document pertaining to the property of the fraternity and, the checkbook. The visitor will review the last three years of the Treasurer’s Annual Report and the last 12 months of all bank statements and receipts.

The visitor will check the records of the elections of the council and the minutes of the council meetings and will request canonical documents for review. He or she will evaluate the quality of the service offered to the fraternity by the minister and by the other leaders and will consider with them the solution to problems that may arise.

**Visit:** In terms of opening and closing prayers, *The Ritual of the Secular Franciscan Order* will be followed referencing page 50. The agenda for the day will typically include the following items.

- Fraternity Meeting
- Meeting with Council:
- Introduction and Overview
- Documentation Review
- Closing and Next Steps
- Individual Meeting(s) (private) as requested

**Report:** The Visitor(s) will prepare a written report that will provide the fraternity with observations and recommendations. Copies of the reports will be sent as follows: one to the Fraternity Minister (to be shared with the members of the fraternity); one to the Spiritual Assistant; one to the Provincial Spiritual Assistant of the Province to which the fraternity is bonded; and one to the Regional Minister to be retained in his/her file.

The Fraternal visit is carried out in the name of the Church and serves to guarantee and promote the observance of the Rule and Constitutions and fidelity to the Franciscan charism. It is hoped it will be experienced as a moment of grace whereby through the assistance and recommendations of the visitor(s), the fraternity will grow in its faithfulness to its vocation, and its members challenged to deepen their fraternal life.

Thank you for taking the time to work on these materials. Your preparation is necessary and extremely useful in the upcoming Fraternal Visit. I look forward to receiving the Pre-Visitation Questionnaire and Self Evaluations prior to our meeting and am excited to visit the whole Fraternity as well as the council.

Your Name

Area Councilor

St. Margaret of Cortona Regional Secular Franciscan Order

Your email Your address

Your phone number

**Pre-Visitation Questionnaire**  
**Completed by the Fraternity Council**

The purpose of this document is to assist fraternities to prepare for the fraternal visitor.

- The completion of this questionnaire is meant to be a collaborative effort accomplished by the entire fraternity council. They may wish to meet together, discuss, and reflect upon the questions and their answers. *It is not intended for one person to fill out.*
- A copy of the completed questionnaire is to be returned by email to the regional area councilor before the Fraternal Visitation. The area councilor will email the Pre-Visitation Questionnaire to the Pastoral Visitor in advance of the Pastoral Visitation.
- A copy is also to be kept for the records of the local fraternity.

\*\*\*\*\*

**Have the following available at the fraternal visitation:**

- Canonical Establishment available at the time of the visitation
- Fraternity Register
- Minister's Binder, etc.
- Secretary's Binder/Council minutes since last elections, etc.
- Formation Director's Binder
- Attendance records for inquirers and candidates, etc.
- *FUN Manual*
- Financial and bank statements, etc.

**Information Required:**

Name of your Fraternity: \_\_\_\_\_

Location of your Fraternity: \_\_\_\_\_

Date Canonically Established: \_\_\_\_\_

Canonically Bonded to: ☐ OFM   ☐ OFM Cap.   ☐ OFM Conv.   ☐ TOR

Date of council elections: \_\_\_\_\_

Members of the current council:

Minister: \_\_\_\_\_

Vice-Minister: \_\_\_\_\_

Secretary: \_\_\_\_\_

Treasurer: \_\_\_\_\_

Formation Director: \_\_\_\_\_

Councilors: \_\_\_\_\_

\_\_\_\_\_

Spiritual Assistant: \_\_\_\_\_

Are any of your current council members appointed? ☐ Yes ☐ No If yes, who?

---

---

Does each council member know their responsibilities per the General Constitutions? ☐ Yes ☐ No

Scheduled Fraternity Meeting Day: \_\_\_\_\_ Time: \_\_\_\_\_

Fraternity Meeting Place: \_\_\_\_\_

Scheduled Council Meeting Day: \_\_\_\_\_ Time: \_\_\_\_\_

**1. Fraternity Statistics:**

Aspirants: \_\_\_\_\_ Inquirers: \_\_\_\_\_ Candidates: \_\_\_\_\_ Active Professed: \_\_\_\_\_ Excused Members: \_\_\_\_\_

**2. Introduction and Aspirant Formation:**

Do you hold an annual open house or other event to encourage interest in the Secular Franciscan Order? ☐ Yes ☐ No If no, why: \_\_\_\_\_

---

Do you have an application and interview process for newcomers? ☐ Yes ☐ No

Does your Council review the applications? ☐ Yes ☐ No

Is there a mutual discernment process between the council and the individual at each stage of formation concerning the person's call to the SFO? ☐ Yes ☐ No

**3. Initial Formation (inquirer, candidate):**

What resources do you use for your initial formation programs? \_\_\_\_\_

---

Are the Rule and the Constitutions integrated in this phase of formation? ☐ Yes ☐ No

How often? \_\_\_\_\_

What structure do you use for formation? \_\_\_\_\_

---

When do the formation groups meet? \_\_\_\_\_

**4. Ongoing Formation:**

What structure do you use for ongoing formation? \_\_\_\_\_

---

Are the Rule and the Constitutions integrated in this phase of formation? ☐ Yes ☐ No

If yes, how often? \_\_\_\_\_

What resources do you use for ongoing formation? \_\_\_\_\_

---

Who has input in determining ongoing formation for the fraternity? \_\_\_\_\_

\_\_\_\_\_

How might the quality of ongoing formation be enhanced? \_\_\_\_\_

\_\_\_\_\_

Are guest speakers invited to speak at ongoing formation gatherings? ☐ Yes ☐ No

\_\_\_\_\_

Is the Spiritual Assistant invited to speak, on occasion, at ongoing formation? ☐ Yes ☐ No

If no, why not? \_\_\_\_\_

Does the Spiritual Assistant attend inquirers/candidates sessions? ☐ Yes ☐ No

What are the style and quality of the monthly meeting? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**5. Spirituality (Please address the following areas):**

What resources does your fraternity use for Common Prayer? \_\_\_\_\_

\_\_\_\_\_

How does the fraternity's embody Franciscan gospel values? \_\_\_\_\_

\_\_\_\_\_

Describe the fraternity's involvement in the life and activities of the local parish(es) to which its members belong: \_\_\_\_\_

\_\_\_\_\_

**6. What is the quality of integration of life and work in the fraternity?** \_\_\_\_\_

\_\_\_\_\_

**7. Does your fraternity have an apostolate(s)?** ☐ Yes ☐ No If yes, Please list:

\_\_\_\_\_

\_\_\_\_\_

**8. What do you feel is the quality of spiritual assistance provided to your fraternity?** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**9. What is the quality of integration of life and work in the fraternity?** \_\_\_\_\_

\_\_\_\_\_



**10. Has the fraternity made any efforts toward increasing vocations to the SFO or within the Church as a whole?** ☐ Yes ☐ No \_\_\_\_\_

**11. Does the fraternity publish a monthly newsletter?** ☐ Yes ☐ No

Do you forward the newsletter to the regional web administrator? ☐ Yes ☐ No

Do you have a fraternity website? ☐ Yes ☐ No If so, provide website address \_\_\_\_\_

**12. What efforts or accomplishments is your fraternity particularly proud of?** \_\_\_\_\_

**13. What are your concerns, needs or problems?** \_\_\_\_\_

**14. What questions or issues do you feel that the Fraternal Visitor can address?** \_\_\_\_\_

**15. Describe the quality of fraternity's participation in regional activities:** \_\_\_\_\_

**16. What are your fraternity's future goals?** \_\_\_\_\_

## Sample Letter

### A letter to the Local Minister who has not sent back the Pre-Visitation Forms

[Ministers name]

Next month [date] your fraternity is scheduled for a regional visitation. Please send me your Minister "Pre-Questionnaire Form" as soon as possible. Please have your council members either e-mail me their "Individual Council Self Evaluations" or send them to me by postal delivery. They should not be returned to you. They should send the evaluation to:

---

(Area Councilor's home address\_

---

or

---

(Area councilor's e-mail address)

If you have not contacted the Regional Spiritual Assistant your fraternity is bonded to for a pastoral visitation, please do so as soon as possible. The region prefers to hold both the regional visitation and the pastoral visitation at the same time. This is not mandatory but it is more convenient for everyone.

Below is a list of the Spiritual Regional Assistants:

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(Name)

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)Title)

**Note Area Councilors:** If a spiritual assistant is not available to conduct a pastoral visitation at the same time as the fraternal visitation, the pastoral visitation should be scheduled at another time.

### **Fraternity Council Self-Evaluation for Each Council Member**

Copies of this questionnaire are sent to the Fraternity Minister no less than two months prior to the time of visitation. They are in turn distributed to the fraternity's Council Members.

The questionnaire is meant to be completed by each Council member separately. It is not to be a collaborative effort. The purpose is to provide each council member an opportunity to voice praise, compliments, concerns, or problems.

Additional information on specific questions may be added on the back of the questionnaire or on a separate page.

The completed questionnaire is to be returned at least two weeks before the date of the visitation directly to the Fraternal Visitor by email or mail. The contents will be shared with the Pastoral visitor:

Name \_\_\_\_\_ Title \_\_\_\_\_

Fraternity \_\_\_\_\_<sup>1</sup> \_\_\_\_\_ Date \_\_\_\_\_

1. Do the council members attend council meetings and fraternity meetings faithfully? ☐ Yes ☐ No
2. Do the council members fulfill their duties responsibly?  
☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. How would you rate the council in regard to task performance for council meetings and fraternity meetings? ☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Does the council give priority to the spiritual well-being and growth of the fraternity?  
☐ Always ☐ Sometimes ☐ Rarely ☐ Never

Comment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Does the council seek to give creative leadership to the fraternity, or just "manage the shop"?  
☐ Always ☐ Sometimes ☐ Rarely ☐ Never

Comment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. What goals should the council set for itself in the future?

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7. How would you rate the leadership of the fraternity's minister?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

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8. Does the minister see that each council member fulfills his or her responsibilities?

☐ Always ☐ Sometimes ☐ Rarely ☐ Never

Comment: \_\_\_\_\_

---

---

9. Does your minister share all official correspondence with you?

☐ Always ☐ Sometimes ☐ Rarely ☐ Never

---

10. How would you rate the spiritual assistance your fraternity receives?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

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11. Are the fraternity's records kept faithfully and adequately?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

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12. How well is the financial planning for the fraternity done according to Franciscan values?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_

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13. How would you rate your fraternity meetings?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. What means is the council using to develop a greater sense of community in the fraternity?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

15. Are the fraternity members as a whole able to share in the long- and short-range planning of the fraternity? ☐ Yes ☐ No

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

16. Is the *Ritual* used regularly at meetings, especially at elections, professions and receptions?

☐ Yes ☐ No

17. Does the fraternity use the *Liturgy of the Hours* regularly at its meetings? ☐ Yes ☐ No

18. Please rate the fraternity's functioning in regard to the Commissions. *Excellent rating would be appropriate if the fraternity had at least appointed one member as a contact person for that area; that person kept up with and reported on what was happening at the Regional and National levels; and the fraternity itself is involved in an active way in that area.*

**Formation:** ☐ Excellent ☐ Good ☐ Fair ☐ Poor

**JPIC<sup>1</sup>:** ☐ Excellent ☐ Good ☐ Fair ☐ Poor

**Youth:** ☐ Excellent ☐ Good ☐ Fair ☐ Poor

19. What is your fraternity's potential to attract new members?

\_\_\_\_\_  
\_\_\_\_\_

20. Does the fraternity understand and celebrate its identity as Franciscan penitents while encouraging growth in ongoing conversion in its brothers and sisters?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<sup>1</sup> Justice, Peace, and Integrity of Creation

21. What would you see as the short- and long-range future of the fraternity?

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22. How would you rate your fraternity's participation at the Regional Level?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

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23. Does your fraternity participate in other area meetings and cooperate with area projects?

☐ Yes ☐ No

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24. Does your fraternity feel an accountability and responsibility with regard to the Regional and National Fraternities? ☐ Yes ☐ N

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Please use this space to comment on any ideas, compliments, concerns, and comments you may have about your fraternity.

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## **FRATERNITY MINISTER'S CHECKLIST IN PREPARATION FOR VISITATION**

This checklist should be completed by the Minister of the Fraternity prior to the Fraternal Visitation and should be made available to the Visitor(s) when they come. The Minister should keep the original of this form in his/her file for transmission to the newly elected Minister when the time comes. Please remember that it is the duty and obligation of each member of Council to transfer all appropriate manuals, records, and documents to the newly elected officers as part of the Chapter of Elections.

**If the fraternity keeps electronic files rather than binders, please provide computer access to these files at time of visit.**

### **FRATERNITY COUNCIL:**

- \_\_\_\_\_ Each office filled by properly elected or appointed professed member<sup>1</sup>
- \_\_\_\_\_ Spiritual Assistant appointed for the fraternity
- \_\_\_\_\_ Consistent monthly Fraternity Council meetings
- \_\_\_\_\_ Records of Council decisions regarding membership (lists of excused or dispensed members; delinquent members, pastoral decisions, related correspondence)

### **FRATERNITY LIFE:**

- \_\_\_\_\_ Consistent time and date for monthly gatherings
- \_\_\_\_\_ Consistent monthly initial formation meetings
- \_\_\_\_\_ Program of ongoing formation provided to the fraternity
- \_\_\_\_\_ Annual retreat provided for the fraternity
- \_\_\_\_\_ Retreat provided for Candidates prior to Profession
- \_\_\_\_\_ Regional programs participated in by fraternity representatives
- \_\_\_\_\_ Fraternity apostolate accepted by membership
- \_\_\_\_\_ Annual roster of membership (Provided to all members, and kept on record)

### **DOCUMENTS ON FILE<sup>2</sup>:**

- \_\_\_\_\_ Document of Canonical Establishment
- \_\_\_\_\_ Fraternity Membership Record Book (Register)
- \_\_\_\_\_ Ritual of the Secular Franciscan Order
- \_\_\_\_\_ **Minister's Binder(s)**, containing copies of:
  - \_\_\_\_\_ Description of the duties of the Office of Minister
  - \_\_\_\_\_ Agendas for Council and Fraternity Meetings
  - \_\_\_\_\_ Minutes of Fraternity and Council Meetings
  - \_\_\_\_\_ Annual Reports submitted to the Region
  - \_\_\_\_\_ Election Procedures, including description of duties of each Office
  - \_\_\_\_\_ Visitation Reports
  - \_\_\_\_\_ Reports of Member Status (transfers, withdrawals, etc.)
  - \_\_\_\_\_ Correspondence
  - \_\_\_\_\_ Fraternity Membership Directory

<sup>1</sup> See SFO General Constitutions, Title IV, Articles 76 through 84, inclusive.

<sup>2</sup> Electronic document-keeping is permitted. Discs of the "documents on file" should be provided to the newly elected Minister.

**Formation Director's Binder(s)**, containing copies of:

- \_\_\_\_\_ Description of the duties of the Office of Formation Director
- \_\_\_\_\_ Regional Formation Manual
- \_\_\_\_\_ Description of Inquirer Formation Program
- \_\_\_\_\_ Description of Ongoing Formation Program
- \_\_\_\_\_ Reports on Inquirers and Candidates (including attendance and progress)

**Secretary's Binder(s)**, containing:

- \_\_\_\_\_ Description of the duties of the Office of Secretary
- \_\_\_\_\_ Agendas and Minutes of Fraternity and Council Meetings (Council Agendas and Minutes should be kept together; Fraternity Meeting Agendas and Minutes should be kept together, but in the same binder)
- \_\_\_\_\_ Chapter of Election Reports
- \_\_\_\_\_ Reports of Member Status (transfers, withdrawals, etc.)
- \_\_\_\_\_ Correspondence
- \_\_\_\_\_ Copies of current and past fraternity newsletters
- \_\_\_\_\_ Inventory of what the fraternity owns (equipment, furniture, books, tapes, videos, etc.)
- \_\_\_\_\_ Directory of Fraternity membership

**Treasurer's Binder(s)**, containing:

- \_\_\_\_\_ Description of the duties of the Office of Treasurer
- \_\_\_\_\_ Treasurer's Reports (provided by Treasurer to Council and made available to the members of the Fraternity)
- \_\_\_\_\_ A bookkeeping ledger of income and expenses (reconciliation of the Fraternity's account should be done monthly).
- \_\_\_\_\_ Audit Reports (prepared the last year of the Treasurer's term by a member of the Fraternity who is not serving on Council)

**Historian's Binder** (containing history of the fraternity, special events, news clippings, pictures, etc.)

**OTHER RESOURCES:**

- \_\_\_\_\_ Extra copies of the Rule and Constitutions
- \_\_\_\_\_ Handbook for Spiritual Assistance
- \_\_\_\_\_ Guidelines for Initial Formation
- \_\_\_\_\_ Resources for Initial formation
- \_\_\_\_\_ Availability of fraternity library



## *The Fraternity Gathering*

**Rule 22 of the SFO Rule** calls for the fraternity gathering to be “a visible sign of the Church, a community of love. It should be a privileged place for developing a sense of Church and the Franciscan vocation, and for enlivening the apostolic life of its members.”

At a fraternal visitation, the area councilor should look for the following:

1. Exploration, through ongoing formation, the spirit of Francis and Clare and the Franciscan way of life
2. Sharing and support for fellow members
3. A period of social time together
4. Coming together in community to pray together

### **Ongoing Formation:**

Ongoing formation occurs at each fraternity gathering and involves all members of the fraternity – visitors, inquirers, candidates, and professed. Initial formation takes place at a time separate from the fraternity gathering. The content of the ongoing formation is open to a variety of topics, but whatever the topic, it should be related to the Franciscan charism. Ongoing formation is an opportunity, through dialogue, for the brothers and sisters to explore and further enrich their Franciscan way of life.

### **Business:**

Business should be a very small part of the fraternity gathering, usually it would entail the council reporting back to the fraternity at-large. The only need for minutes would be to record a decision made by the entire fraternity, and this would be an addendum to the council minutes. Many business items can be shared with the fraternity through the fraternity newsletter.

### **Social Time:**

Social time is a very important part of each fraternity gathering. This is the time when Franciscan brothers and sisters are present to each other informally and joyfully. This time is key to the formation of a community of love. Often it is the time when true sharing occurs sharing food as well as sharing stories and ideas. As a community, the Franciscan Spirit grows.

### **Prayer:**

Prayer at a fraternity gathering can take a variety of forms; the precise form is not important. What is important is that the fraternity spends time in community prayer. The most common form is the Divine Office, The Liturgy of the Hours.

**Area Councilors should be aware of the following:**

## *Affiliate Orientation Plan*

### **Article 53.5 General Constitutions**

The national statutes can indicate special forms of association with the fraternity for those who, without becoming a member of the OFS, want to participate in its life and activities.

### **Article 103. 1 General Constitutions**

Remaining faithful to their own identity, the fraternities will take care to make the most of each occasion for prayer, formation, and active collaboration with other ecclesial groups. They should welcome with pleasure those who, without belonging to the OFS, wish to share its experiences and activities.

### **Article 18. 13 NAFRA Statutes Affiliation with a local fraternity**

- a. Those who, without belonging to the OFS, wish to participate in its life and activities (See [GC Article 53.5](#) and Article 103.1) according to Franciscan principles and teachings, may be welcomed by the local fraternity, so as to make their communion living and effective. Individuals wishing to become affiliates should make their desire known by a written request to the local fraternity council, which makes a decision regarding the request.
- b. These affiliate brothers and sisters will have no juridical bond with the Secular Franciscan Order and are, therefore persons welcomed to love and be loved “as a gift of the Lord and an image of Christ” (OFS Rule 13). They may share the experiences and activities of the fraternity, without the right to vote.
- c. In order that the identity of the fraternity not be altered, the number of affiliates may not exceed 40% of the number of active professed members of a fraternity.
- d. Regional councils have the right to establish their own guidelines for the acceptance of affiliates.

### **Process**

- Before proceeding with a request for affiliate status, read pages 13-25 in *Praying with Francis of Assisi*; the section “Is praying with Francis for you?” and the overview on Francis and Franciscan Spirituality.
- Before responding to a request for affiliate status, read General Constitutions

Article 53.5 and Article 103.1 and NAFRA Statutes Article 18.13).

- An interested individual makes a written request to the local fraternity minister and is interviewed by a member of the local fraternity council.
- A sponsor (a professed SFO) is assigned and orientation materials are provided.
- Should a person in affiliate status seek to become a professed member of the SFO, then the requirements of the formal formation program supersede all parts of the affiliate orientation plan. Affiliation orientation does not shorten or alter the norms of the Formation Program of the SFO.

Note that at the beginning of affiliate orientation the local fraternity minister and assigned sponsor must clearly advise that the affiliate, once approved, has no juridical bond, no right to vote or hold office, nor any official status within the SFO.

### **Orientation**

- The sponsor and affiliate in process meet monthly to complete 12 sessions from one of the suggested resources:
  1. *Praying with Francis of Assisi*, Joseph Stoutzenberger & John Bohner, St. Mary's Press

2. *A Retreat with Francis and Clare of Assisi: Following our Pilgrim Hearts*, Murray Bodo, OFM, and Susan Saint Sing, St. Anthony Messenger Press, 1996
  3. *Francis and Clare, A Gospel Story*, Helen Julian, CSF, The Word Among Us, 2005
  4. *Francis, the Journey and the Dream*, Murray Bodo, OFM, St. Anthony Messenger Press, 2012
  5. *The Way of St. Francis: The Challenge of Franciscan Spirituality for Everyone*, Murray Bodo, OFM, St. Anthony Messenger Press. 1995
- Concurrently with beginning the 12 sessions, the person seeking affiliate status is presented with and asked to read some selections on Franciscan Spirituality.
  - On the recommendations of the sponsor and local minister, the local council approves the affiliate.
  - Once approved, the initial affiliation is made for a period of two years and commences with a simple welcoming in the context of a fraternity social gathering (meeting, potluck, picnic, but not a Mass or a Rite), and a simple certificate of affiliation is presented.
  - A medal of St. Francis may be presented, but not the Tau or Tau jewelry, which are reserved for the members of the Order.

### **Ongoing**

- The affiliate must express a desire to remain as an affiliate and make a written request for renewal every two years.
- If the request is approved, a renewal ceremony occurs, similar to the initial welcoming.
- The affiliate continues to grow through prayer, study, and immersion in the life of the local fraternity

## Visitor's Questionnaire Sheet for Visitation

Name of the Fraternity: \_\_\_\_\_ Fraternity No. 57-1 \_\_\_\_\_

Members of the Council:

Minister: \_\_\_\_\_

Vice Minister: \_\_\_\_\_

Secretary: \_\_\_\_\_

Treasurer: \_\_\_\_\_

Formation Director: \_\_\_\_\_

Councilor(s): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Active Professed: \_\_\_\_\_ Excused Members: \_\_\_\_\_ Candidates: \_\_\_\_\_

Inquirers: \_\_\_\_\_ Inactive Members: \_\_\_\_\_

Visitor will review the following:

1. Canonical Documents
2. Letter from Provincial bonding the fraternity
3. Minutes of Council Meetings past three years
4. Treasurer's Reports for the past three years (provided by Treasurer, circulated to Council, made available to the membership and appropriately audited)
5. Formation Director's reports on candidates (including attendance and progress)
6. Annual rosters of membership (Provided to all members and kept on record)
7. Procedures for storing applications and required documents from candidates such as Initial Application, Baptismal Certificate, First Communion Certificate, Confirmation Certificate, Marriage Certificate, and Annulment Certificate if applicable. If applicable, a diocesan clergy wishing to enter the Secular Franciscan order, if ordained, copy of letter verifying faculties. Notice of Dismissal, etc.

Questions for the council at time of fraternal visitation:

1. How often does your Council meet?
2. What means is the council using to develop a greater sense of community in the fraternity?
3. Is the meeting time and date a problem?
4. Is there fellowship outside the fraternity among council members and fraternity?
5. Are your members involved in outside activities as a fraternity?
6. What outreach programs are your fraternity members involved in?
7. What other activities are engaged in within the fraternity throughout the year?
8. What is your fraternity's plan to attract new members?
9. Do you have a Theme for the Year?
10. What Goals should the council set for itself in the future?
11. Do you contact the region's Database Manager, Mary Lou Coffman, OFS, when change of status for a member occurs?

## Visitation Stipend

*According to the Statutes of the National Fraternity  
of the Secular Franciscan Order in the United States of America:*

### **Article 18.8**

The local fraternity will present to the Regional Minister or his or her delegate and to the Regional Spiritual Assistant or the representative of the Conference of Regional Spiritual Assistants a stipend appropriate to the journey made and the length of stay required at the time of fraternal and pastoral visits, and also on the occasion of their presiding over and witnessing elections.

## **Sample Cover Letter**

**(for Draft of Regional Visitation Report  
to be reviewed by fraternity minister)**

**(Name of Minister),**

Again, thank you for allowing me to visit such a wonderful group of Secular Franciscan sisters and brothers. It was a pleasure meeting all and to see such a faith filled group of Franciscans.

Attached please find my draft report of your recent visitation. Please read it over and return to me, indicating any corrections or additions you feel are necessary. Once I have completed the draft, I will forward to the regional minister as a final report.

Thank you and the members of your council for your servant leadership in your fraternity.

**(Area Councilor Name and Title)**

## Regional Visitation Report

Fraternity: \_\_\_\_\_ No. 57-1 \_\_\_\_\_

Date of Visitation: \_\_\_\_\_

Gathering Address: \_\_\_\_\_

Date Canonically Approved: \_\_\_\_\_

Canonically Bonded Order: OFM ☐ OFM Cap. ☐ OFM Conv. ☐ TOR ☐

The following Council Members were elected on: \_\_\_\_\_

Minister: \_\_\_\_\_

Vice Minister: \_\_\_\_\_

Secretary: \_\_\_\_\_ (elected) (appointed)

Treasurer: \_\_\_\_\_ (elected) (appointed)

Formation Director: \_\_\_\_\_ (elected) (appointed)

Councilor: \_\_\_\_\_ (elected) (appointed)

Councilor: \_\_\_\_\_ (elected) (appointed)

Spiritual Assistant: \_\_\_\_\_

OFM ☐ OFM Cap. ☐ OFM Conv. ☐ TOR ☐ Other ☐

Meeting Day/Time: \_\_\_\_\_

Meeting Place: \_\_\_\_\_

Scheduled Council Meeting Day/Time: \_\_\_\_\_

Aspirants: \_\_\_\_\_ Candidates: \_\_\_\_\_ Excused: \_\_\_\_\_ Affiliates: \_\_\_\_\_

Inquirers: \_\_\_\_\_ Professed: \_\_\_\_\_ Withdrawn: \_\_\_\_\_

## Regional Visitation Report

### Fraternal Assessment

**The fraternal assessment is based on a meeting with the Council and attending the fraternity gathering.**

The Meeting with the Council included the following:

Met with council lasting: \_\_hours and \_\_minutes.

State of the Fraternity's record keeping, minister binder, secretarial and financial records, Formation, and other necessary records:

**Name of Minister:** \_\_\_\_\_

Ministers Binder:

1. Condition of the Ministers Binder: [ ] Excellent [ ] Good [ ] Fair [ ] Poor

Explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Do you have an archivist? Yes [ ] No [ ]

3. Who maintains the documents? \_\_\_\_\_

4. Where are the records stored?

Explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Does the fraternity publish a monthly newsletter? Yes [ ] No [ ]

6. Does the editor forward the newsletter to the regional website administrator? Yes [ ] No [ ]

7. Does the fraternity have a website? Yes [ ] No [ ]

If so, provide the website address: \_\_\_\_\_

**Name of Secretary** \_\_\_\_\_

Secretary Reports:

1. Were council meeting minutes presented? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Was the fraternity register available? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



3. Condition of register? Excellent [ ] Good [ ] Fair [ ] Poor [ ]

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Was A letter of Canonical Establishment of the fraternity present for review? Yes [ ] No [ ]

5. Was a copy of the last Report of Elections presented? Yes [ ] No [ ]

**Name of Treasurer:** \_\_\_\_\_

Treasurer Reports:

1. Was the latest Audit Report available? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Did Treasurer produce financial and bank statements? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Name of Formation Director:** \_\_\_\_\_

Formation Directors' Binders and Files:

1. What resources do you use for your initial formation programs?

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. What resources are used for ongoing formation?

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. What structure do you use for ongoing formation?

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Who has input in determining ongoing formation?

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Are guest speakers invited to speak at ongoing formation gatherings? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Is the spiritual assistant invited to speak, on occasion, at ongoing formation? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Were Attendance records for Inquirer and Candidates available for review? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. *Was Up to Now* (FUN Manual) available for review? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Does the spiritual assistant attend inquirer/candidates' sessions? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. Were Sacramental documents available for viewing? Yes [ ] No [ ]

**See requirements and sites below:**

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Below are the National Statutes and FUN Manual requirements:

**NAFRA National Statutes Article 19:2**

**Article 19. Formation**

**2. Initial Formation:**

- d. To be admitted to the SFO in the United States, a person must be a fully initiated member of the Catholic Church (i.e., having received the Sacraments of Baptism, Chrismation/Confirmation and Holy Eucharist) in addition to being an actively practicing Catholic.

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**For Up to Now (FUN) Manual**

The following documents must be on file prior to the Rite of Admission and should be obtained early in the Inquiry Phase:

- Baptism Certificate, Holy Eucharist, Confirmation documents annotated with other sacrament dates.
- If married, provide verification of validity.
- Decree of Nullity, if applicable.
- If ordained, provide copy of a letter verifying faculties.
- Two letters of recommendation, one being from the Inquirer's pastor.

**NOTE:** It is recommended that all information forms, sacrament records, interview observations, correspondence, letters of recommendation, and other notes be kept in a confidential file folder for each prospective member. This will help the Fraternity Council in its discernment process.

For the Formator 3-23-2011 Page 18 of 26

**A Must Do:** As stated in the National Statutes and Fun Manual a copy of the sacramental documents are to be placed in a file and stored in a safe place.

11. Do you have a Formation Team? Yes [ ] No [ ]

If no, explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**The Regional Visitor's observation of the fraternity gathering:**

1. The structure of the fraternal visitation fraternity gathering.

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. The number attending the fraternal visitation gathering: \_\_\_\_\_

3. Additional Remarks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Fraternity Life

Style and quality of monthly gatherings:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

The quality of integration of life and work in the Fraternity:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

Apostolates:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

Manner and quality of vocational promotion in the Fraternity:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

Quality of Fraternity's participation in district and regional activities:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

Future Goals:

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

What are your concerns, needs, or problems?

Explain: \_\_\_\_\_

\_\_\_\_\_

**(This information can be taken from the Pre-Questionnaire)**

Fraternal Visitor: \_\_\_\_\_

Respectfully submitted:

/s/ \_\_\_\_\_, OFS Date: \_\_\_\_\_

Title: \_\_\_\_\_

**Title VI**  
**THE FRATERNAL VISIT AND THE PASTORAL VISIT**

*The Pastoral Visit*

**Article 95**

1. The pastoral visit is a privileged moment of communion with the First Order and the TOR. It is carried out also in the name of the Church and serves to guarantee and promote the observance of the Rule and the Constitutions and fidelity to the Franciscan charism. The visit is carried out with respect to the organization and the law proper to the OFS itself.
2. Having verified the canonical establishment of the fraternity, the visitor will give attention to the relations between the fraternity and its spiritual assistant and the local Church. The visitor will meet the pastors (bishop or parish priest) when this is opportune for fostering communion and service for building up the Church.
3. The visitor will promote collaboration and a sense of co-responsibility among the secular leaders and the religious assistants. The visitor is to examine the quality of the spiritual assistance given to the visited fraternity, encourage the spiritual assistants in their service and promote their continuing spiritual and pastoral formation.
4. The visitor will give special attention to programs, methods and experiences of formation, to the liturgical and prayer life, and to the apostolic activities of the fraternity.

**Additional Responsibilities:**

It is suggested that when the fraternity minister request the pastoral visitation and fraternal visitation, they take place at the same time, saving your fraternity an extra visit from the region.

The fraternity minister should contact the regional area councilor to request a fraternal visitation. The pastoral visitation request should be made to the next higher level (Regional Council of Spiritual Assistants) and should be directed to the regional spiritual assistant to which the fraternity is bonded. Do not hesitate to contact your regional area councilor for assistance if needed.

## *Checklist for Pastoral Visitation*

Date and Time: \_\_\_\_\_

Fraternity: \_\_\_\_\_

### **Formation:**

Number of Candidates \_\_\_\_\_ Inquirers \_\_\_\_\_ Aspirants \_\_\_\_\_

Check Register of:

- ☐ Reception:
- ☐ Profession
- ☐ Evaluate Community Prayer
- ☐ Evaluate Community Life and Living the Charism
- ☐ Evaluate Quality and Content of Formation
  - ☐ Initial
  - ☐ Ongoing
- ☐ Evaluate participation in region and local parishes
- ☐ Evaluate ministry of local Spiritual Assistant
  - ☐ Attendance at council meetings
  - ☐ Availability to fraternity
- ☐ Ascertain Involvement in apostolates
- ☐ Dialogue about setting one spiritual goal for

fraternity  
Give a short spiritual exhortation and assure fraternity of regional Spiritual Assistant's availability.

Anne Mulqueen, OFS delegated Regional Spiritual Assistant – May 2016

## *Elections in the General Constitutions and National Statutes*

### **Article 31 General Constitutions**

1. **Rule 21** "On various levels, each fraternity is animated and guided by a council and minister (or president) ." These offices are conferred through elections, in accordance with the Rule, the Constitutions, and their own Statutes. Only by way of exception or in the first phase of their establishment may fraternities exist without a regular council.

The council of the higher level will make the arrangements necessary for this inadequate situation only for the specific amount of time it takes to get a fraternity back on sure footing or to establish a new fraternity; to give its leaders the proper formation and to carry out the elections.

2. 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.
3. The leaders of the SFO at every level should 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.
4. The leaders should see to the spiritual and technical preparation and animation of the meetings, both of the fraternities and of the councils. They should seek to inspire life and soul into the fraternities by their own witness, suggesting appropriate means for the development of the life of the fraternity and of apostolic activities in the light of the fundamental Franciscan options. They should see to it that the decisions made are carried out and they should promote collaboration among the brothers and sisters.

### **The Fraternity Council**

### **Article 49 General Constitutions**

2. The fraternity, meeting in an assembly or chapter, discusses questions regarding its own life and organization. Every three years, in an elective assembly or chapter, the fraternity elects the minister and the council in the way established by the Constitutions and statutes.

### **Title IV: ELECTION TO AND TERMINATION OF OFFICES**

### **Article 76 General Constitutions**

1. The elections at the various levels will take place according to the norms of the law of the Church [See Can. 164 ff.] and of the Constitutions

The convocation should be carried out at least one month in advance, indicating the place, the day, and the time of the election.

2. The elective assembly, or chapter, will be presided over by the minister of the immediately higher level, or by his or her delegate, who confirms the election.

The president or the delegate cannot preside over the elections in his or her local fraternity, nor the elections of the council of a higher level, of whose council he or she is a member.

The spiritual assistant of the immediately higher level or his delegate is to be present as a witness of the communion with the First Order and the TOR.

3. The president of the chapter and the assistant of the higher level do not have the right to vote.

4. The president of the chapter designates, among the members of that chapter, a secretary and two tellers.

#### **Article 77 General Constitutions**

1. In the local fraternity the perpetually professed of the same fraternity have active voice, that is can elect, and passive voice, that is can be elected. The temporarily professed have only active voice.
2. At the other levels, the following have active voice: the secular members of the outgoing council, the representatives of the immediately lower level and of the Franciscan Youth, if professed. It belongs to the particular statutes to establish more concrete norms in application of the preceding norm, taking care to assure the broadest elective base. The perpetually professed secular Franciscans of the corresponding area have passive voice.
3. Both the national and the international statutes – each for its own area – can establish objective qualifications regarding who can be elected to the various offices. [See [General Constitutions Article 31.3; National Statutes 11.2](#)]
4. The presence of more than half of the number of those having the right to vote is required for the valid celebration of an elective chapter. For the local level, the National Statutes can establish a different norm. [For the local level, see [NS Article 18.6](#): “No official business may be transacted at a Local Fraternity meeting unless a quorum is present. The quorum consists of a majority of active members who are not excused from attendance.”]

#### **Article 78 General Constitutions**

1. An absolute majority of the votes of those present, cast in secret, is required for the elections of the minister. After two inconclusive ballots, the voting continues between the two candidates who have obtained the largest number of votes or, in case there are more than two, between the two candidates who are oldest by profession. If there is still a tie after the third ballot, the older by profession will be considered elected.
2. The election of the vice minister proceeds in the same manner.
3. For the election of the councilors, after a first ballot without an absolute majority, a relative majority of the votes of those present, cast in secret, is sufficient, unless the particular statutes require a greater majority .
4. The secretary announces the result of the elections; the president confirms the election according to the Ritual, part II, chapter II, if all has been carried out properly and those elected have accepted their office.

#### **Article 79 General Constitutions**

1. The minister and vice-minister may be elected for two consecutive terms of three years each. For a third and final successive election to the office of minister or vice-minister, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary. [See [National Statutes 13.2](#)]
2. The outgoing minister cannot be elected vice-minister.
3. The councilors may be elected for additional successive terms of three years . Beginning with the third successive election, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary.
4. The general minister, vice-minister and presidency councilors can be elected for only two consecutive terms of six years.



5. The council of the higher level has the right and duty to invalidate the elections and to call them anew in all cases of in observance of the preceding norms .

#### **Article 80 General Constitutions**

The particular statutes may include further directives concerning elections, as long as they are not contrary to the Constitutions.

\*\*\*\*\*

#### **Statutes of the National Fraternity of the Secular Franciscan Order in the USA**

#### **Article 3.5.**

The National Fraternity Council meets in elective chapter every three years; the National Minister convokes this meeting at least two months in advance, indicating the place the day and the time of the election.

#### **NS Section II**

[Ed. Note: this applies also to regions, See [Article 23.4](#), and to local fraternities, See [Article 28](#).]

#### **STATUTES FOR SPIRITUAL AND PASTORAL ASSISTANCE TO THE SFO Rome, 2002**

#### **Article 12.3.**

The spiritual assistant is by right a voting member of the council and of the chapter of the fraternity to which he or she gives assistance and collaborates with it in all activities . Only in economic matters and in elections at any level does he or she not enjoy the right to vote .

**Secular Franciscan Order  
St. Margaret of Cortona Region**

**REQUEST FOR FRATERNITY ELECTION**

Name of Fraternity: \_\_\_\_\_ 571- \_\_\_\_\_

Location: \_\_\_\_\_

The above-named fraternity requests a Chapter of Elections to be held at:

\_\_\_\_\_

(Gathering Place)

\_\_\_\_\_

(Street Address)

\_\_\_\_\_

(City and State)

Our gathering is on the ( \_\_\_\_\_ ) of the month.

We hereby request that the Region provide a Presider to conduct the elections, as well as a Friar Witness. The fraternity council has appointed a nominating committee. To confirm the above date, and for further information, please contact:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Send this form to your Regional Executive Councilor for action.**

*Place in Fraternity Newsletter or Distribute to Members Two Months Before Elections*

## The Offices in the Fraternity

### Article 51

1. While firmly upholding the co-responsibility of the council to animate and guide the fraternity, the minister, as the primary person responsible for the fraternity, is expected to make sure that the directions and the decisions of the council are put into practice and will keep the council informed about what he or she is doing.
2. The **minister** also has the following duties:
  - a. to call, to preside at, and to direct the meetings of the fraternity and council; to convoke every three years the elective chapter of the fraternity, having heard the council on the formalities of the convocation;
  - b. to prepare the annual report to be sent to the council of the higher level after it has been approved by the council of the fraternity;
  - c. to represent the fraternity in all its relations with ecclesiastical and civil authorities. When the fraternity acquires a juridical personality in the civil order, the minister becomes, when possible, its legal representative;
  - d. to request, with the consent of the council, the pastoral and fraternal visits, at least once every three years.
  - e. to put into effect those acts which the Constitutions refer to his or her competence.

### Article 52

1. The **vice-minister** has the following duties:
  - a. to collaborate in a fraternal spirit and to support the minister in carrying out his or her specific duties;
  - b. to exercise the functions entrusted by the council and/or by the assembly or chapter;
  - c. to take the place of the minister in both duties and responsibilities in case of absence or temporary impediment;
  - d. to assume the functions of the minister when the office remains vacant;
2. The **secretary** has the following duties:
  - a. to compile the official acts of the fraternity and of the council and to assure that they are sent to their respective proper recipients;
  - b. to see to the updating and preservation of the records and the registers, noting admissions, professions, deaths, withdrawals, and transfers from the fraternity;
  - c. to provide for the communication of the more important facts to the various levels and, if appropriate, to provide for their dissemination through the mass media.
3. The **master of formation** has the following duties:
  - a. to co-ordinate, with the help of the other members of the council, the formative activities of the fraternity;
  - b. to instruct and enliven the inquirers during the time of initiation, the candidates during the period of initiation formation, and the newly professed;

- c. to inform the council of the fraternity prior to profession, concerning the suitability of the candidate for a commitment to live according to the Rule.
- 4. The **treasurer**, or bursar, has the following duties:
  - a. to guard diligently the contributions received, recording each receipt in the appropriate register, with the date on which it was given, the name of the contributor, or the one from whom it was collected;
  - b. to record in the same register the items of expense, specifying the date and the purpose, in conformity with the directions of the fraternity council;
  - c. to render an account of his or her administration to the assembly and to the council of the fraternity according to the norms of the national statutes;
- 5. The provisions regarding the rights and duties of the vice-minister, the secretary and the treasurer apply, with the appropriate adaptations, to all levels.

## *Election Requirements*

The following information should answer questions the fraternity may have about the elections and should be discussed at a meeting prior to elections.

1. The elections will take the place of the gathering. [**National Statutes Article.18.6:** “No official business may be transacted at a Local Fraternity meeting unless a quorum is present. The quorum consists of a majority of active members who are not excused from attendance.”] The last duty of the outgoing minister will be to introduce the regional presider and the regional witness to the fraternity members.
2. Active professed and excused sisters and brothers are eligible to vote and to hold a council office. (See [NAFRA Statutes 18 7a and b](#))
3. Temporarily professed may vote, but may not hold a council office. Separate professed from non-professed
4. Inquirers and candidates may not vote in council elections.
5. More than half of “professed” (per the fraternity roster) must be in attendance to establish a quorum. (See [General Constitutions Article 77-4](#))
6. Only those present at the elections may vote; “absentee ballots are NOT allowed.” (See *Handbook for Spiritual Assistance to the Secular Franciscan Order* (Witnessing Elections page 56 (D))
7. Temporary and permanently professed members must be on time: arriving once the election begins makes one ineligible to vote.
8. All nominees must be present, unless there is some circumstance that legitimately prevents a candidate from attending, e.g., illness.
9. No one may be nominated from the floor if they are not present.
10. Once the presider closes the nominations, the voting must take place.

### **General Constitutions Article 79**

1. The minister and vice-minister may be elected for two consecutive terms of three years each. For a third and final successive election to the office of minister or vice-minister, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary. [See [National Statutes 13.2](#)]
2. The out-going minister cannot be elected vice-minister.
3. The councilors may be elected for additional successive terms of three years. Beginning with the third successive election, a majority of two-thirds.

### **NAFRA Statutes Article 9: Quorum; Majority; Counting Ballots; Procedure**

3. Where questions arise concerning procedures that are not covered by the Code of Canon Law, the General Constitutions or the National Statutes, reference may be made to Robert’s Rules of Order. The President of the Elective Chapter (i.e., the Secular Franciscan who presides), after taking advice, retains the authority to determine any matter of procedure.

# *Fraternity Election Procedures Before Elections*

## **Nominations Committee**

It is the duty of the Nominations Committee to ensure that each nominee meets the qualifications for the office, has reviewed the duties of that office, and is willing to serve if elected. The presider also has the duty to review all the nominations, including those from the floor, to make sure that they conform to the requirements enunciated by NAFRA. Those nominated from the floor must be present in order to accept the nomination.

The fraternity should make sure the environment is suitable for the election procedure.

Prerequisites include:

- Copy of the Regional Guidelines for the presider to review
- Copies of the Ritual for the presider and the secretary of the election
- A long table with four chairs facing the assembly
- A chalkboard, dry erase board, flip chart or similar item, in view of everyone, on which to write the names of each candidate and to tally votes
- A supply of blank paper and slips of blank paper for ballots
- Two baskets or other containers in which to collect the ballots
- A “roll call list,” prepared by the outgoing council or the nominations committee
- The members of the newly elected council will need copies of the Ritual and the Apostles Creed for use during the concluding prayers (See Ritual page 42)

Jan Parker OFS (NAFRA Secretary, 2009–2015 and current National Minister) compiled this “step by step” document in 2013. It is based on the procedures finalized by the Conference of National Spiritual Assistants, August 2, 1994, and conforms to the National Statutes, as revised and approved in 2013.

*Fraternity Chapter of Elections*  
*Nominations Slate*

Name of Fraternity: \_\_\_\_\_ Fraternity No. \_\_\_\_\_

**Nominations for Minister**

_____	_____
_____	_____

**Nominations for Vice Minister**

_____	_____
_____	_____

**Nominations for Secretary**

_____	_____
_____	_____

**Nominations for Treasurer**

_____	_____
_____	_____

**Nominations for Director of Formation**

_____	_____
_____	_____

**Nominations for Other (i.e. Councilor)**

_____	_____
_____	_____

Nomination Committee Chair: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



The National Fraternity of the Secular Franciscan Order

### *Suggested Election Procedures*

Before the Election:

**The Presider will go over the following with the Secretary of Elections:**

1. Instructions (Secretary does not tally on the board nor collect or distribute ballots)
2. The slate of nominees obtained from nomination committee
3. Make sure current council nominees are not seeking a third term in the same position. If they are, the vote must be two thirds of the number of professed voting
4. Has “**Ballot and Vote Count Tally Sheets**” (See [page 69-70](#)) or blank paper on which to write names and keep tallies for each vote, and has a “Report of Elections Form” (See [page 71](#))
5. Has a stroke board to report votes as they are counted. Number of attending professed must be written in the upper right corner of the stroke board.
6. Secretary of elections will inform the professed of the elected position, Ritual, page 42 after final tally vote.

**The Presider will go over the following with the Tellers:**

1. Teller #1 will count out loud (facing the professed members) the number of ballots corresponding to the number in the upper right corner on the stroke count board.
2. Teller #2 will recount out loud (facing the professed members) the number of ballots corresponding to the number in the upper right corner on the stroke count board.
3. Once the count is approved by the friar witness, the presider will ask the professed to raise their hands, and the teller will distribute the ballots.
4. The presider will make sure the professed have completed voting and have folded the ballots. Then the teller will collect the ballots.
5. Teller #1 will count out loud the number of ballots received; the number must match the number in the upper right corner on the stroke board. The ballots remain folded.
6. Teller #2 will recount out loud the number of ballots received; that number must match the number in the upper right corner on the stroke board. The ballots remain folded.
7. After the friar witness approves the count, teller #2 will go to the stroke count board, and teller #1 will read the name out loud. A stroke count will be placed next to the appropriate name for each vote.

Note: presider and secretary must have a copy of the *Ritual* bookmarked at page 42.85

**Prior to the start of the elections:**

The Minister of the Fraternity will introduce the Presider and the Friar Witness and turn the meeting over to the Presider of the Elections.



## Presider of Elections Procedures

Introduces the friar witness, (or delegate) representing the Regional Spiritual Assistants of the region as the official ecclesiastical witness.

**THANKS the outgoing council by having them stand and asking the fraternity applaud.**

### The Presider Will Inform the Fraternity

1. “This is a **prayerful** time for the fraternity, **silence** is essential during the election.”
2. If someone has a question during the elections, they should speak up immediately – not after all is said and done.
3. If someone needs to leave the room during the elections, please let the presider know. The election process will resume when the person(s) leaving the room returns. A re-count of professed members will be taken to ensure that the number eligible to vote matches the number on the upper right corner of the stroke count board.
4. The presider will request that fraternity hold applause until the one who has been elected accepts the election and is confirmed by the presider. (*Ritual*, page 42).
5. Introduce the secretary and tellers.
6. Separate the professed (at the front) from non-voters (near the back).

### The following will be read to the Fraternity before the election process begins

**REQUIREMENTS:** “The leaders of the SFO at every level should 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.” ([Art. 31:3, General Constitutions](#))

“The leaders should see to the spiritual and technical preparation and animation of the meetings, both of the fraternities and of the councils. They should seek to inspire life and soul into the fraternities by their own witness, suggesting appropriate means for the development of the life of the fraternity and of apostolic activities in the light of the fundamental Franciscan options. They should see to it that the decisions made are carried out, and they should promote collaboration among the brothers and sisters.” ([Art. 31:4, General Constitutions](#))

## Election Process Begins

**The presider says:** Let us put ourselves in the presence of the Lord.

**Prayer** - Come Holy Spirit, enkindle in us the fire of your love and fill the hearts of your faithful people with your spirit of dedication and Unity.

The regional witness prays from the ***Ritual page 41***. The regional witness takes a seat at the table next to the Secretary/tellers when finished reading from the Ritual.

## Information for Presiders:

### Article 79

1. The minister and vice-minister may be elected for two consecutive terms of three years each. For a third and final successive election to the office of minister or vice-minister, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary .
2. The outgoing minister cannot be elected vice-minister.
3. The councilors may be elected for additional successive terms of three years. Beginning with the third successive election, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary.

### The presider will inform the gathering:

Today we will be electing people to fill the following positions: minister, vice minister, secretary, treasurer, formation director, councilors if any.

## During the Elections:

### The presider:

1. Secretary does the “roll call of professed members eligible to vote.” Each professed member will say “here” when their name is called; a check will be placed before their name if present. If professed member is absent, an “x” will be placed before the name.
2. The Secretary informs the presider the total number of eligible temporarily professed and professed members of the fraternity. More than half of the professed must be present for elections to take place. A temporarily professed member may vote but may not hold office.
3. Obtains the slate of nominees from the nomination committee or elections secretary.
4. Reminds voters that for the minister and vice minister an absolute majority is needed.
5. Nominations from the slate for the position to be voted on are listed on the board by the teller.
6. Asks the election secretary if any current council nominees are seeking a third term. (They will need a minimum of two thirds of the votes to be re-elected.
7. Nominations from the floor are requested. The presider will ask three times: “Are there any nominations for the office of [name position]?” If a nominee accepts, the name will be added to the “slate” on the stroke count board, and the secretary adds the name on the tally sheet.
8. After the third request for nominees from the floor, the presider declares, “Nominations for [name position] are hereby closed.”
9. Facing the voters, the teller not assigned to stroke tally counts out loud the number of ballots to be distributed. This number must match the number in the upper right corner of the stroke count board/sheet.

10. Facing the voters, the second teller recounts the number of ballots to be distributed out loud. The number must match the number of eligible voters listed on the stroke count board/sheet in the upper right corner.
11. The presider asks the friar witness if the ballot count is correct.
12. The presider instructs the voters to place only one name on the ballot from the list of nominees on the board and then fold the ballot. **(If a name appears on a ballot but is not on the list of nominees on the board, the voting process will need to start over again.)**
13. The presider asks the professed members to raise their hands.
14. The teller who is not assigned to tally the votes on the board will distribute the ballots to professed members only.
15. The presider checks to make sure the professed have completed voting and **have folded the ballots**, The teller will then collect the ballots.
16. Facing the voters, the teller collects each ballot in a basket, returns to the front of the room, and counts out loud the number of ballots received **(Do not open ballots.)**
17. Facing the voters, the other teller recounts the number of ballots out loud to ensure that all ballots were collected.
18. The friar witness approves the ballot count.
19. The vote counting process begins.
20. After all the folded ballots are counted, the seated teller, facing the voters, will open them, one by one, announcing the name on each ballot out loud, while the secretary records the tallies. The second teller will place the stroke count on the board/sheet for all to see. After all ballots are read out loud, the presider asks the friar witness to confirm the stroke count.
21. If the number of votes does not equal the voters present, the voting process for that candidate must start over.
22. If the required number of votes is met and the tally numbers on the board are approved by the friar witness, the secretary of elections asks the nominee to stand, and reads from the **Ritual, page 42**.

### **The Presider:**

If the person elected accepts, the presider **confirms the election, Ritual, page 42**, and the secretary of the elections **writes the name of the elected on the Report of Elections**. The fraternity may applaud.

**Note:** After two inconclusive ballots, the voting continues between the two candidates who have obtained the largest number of votes or, in case there are more than two, between the two candidates who are oldest by profession. If there is still a tie after the third ballot, the older by profession will be considered elected. [See [General Constitutions 78.1](#)]

This procedure is repeated for each elected office.

NATIONAL FRATERNITY of the SECULAR FRANCISCAN ORDER - USA

Ballot and Vote Count Form

Fraternity \_\_\_\_\_ Date of Election \_\_\_\_\_

Eligible Voters \_\_\_\_\_

Quorum \_\_\_\_\_ [more than half the eligible voters must be present]

Number of votes needed for: Absolute \_\_\_\_\_ Relative \_\_\_\_\_ Two Thirds \_\_\_\_\_  
[more than half] [highest number]

OFFICE	BALLOT #1	BALLOT #2	BALLOT #3
MINISTER			
VICE MINISTER			
SECRETARY			
TREASURER			

[Administrative Info: Active voice = the right to vote (permanently and temporarily professed); Passive voice = the right to be elected to office permanently professed. After two consecutive terms, a third term MUST be elected by two-thirds vote on the first ballot. Nominations from the floor must be called for three times. All elections must be carried out according to the SFO General Constitutions and National Statutes .]

NATIONAL FRATERNITY of the SECULAR FRANCISCAN ORDER - USA

Ballot and Vote Count Form

OFFICE	BALLOT #1	BALLOT #2	BALLOT #3
FORMATION DIRECTOR			
COUNCILOR			
COUNCILOR			
COUNCILOR			
Presider			
Signature	Print Name		
Friar Witness			
Signature	Print Name		
Secretary of Elections			
Signature	Print Name		
Teller			
Signature	Print Name		
Teller			
Signature	Print Name		

**NATIONAL FRATERNITY of the SECULAR FRANCISCAN ORDER - USA**

## REPORT OF ELECTION

Fraternity Name: \_\_\_\_\_ # \_\_\_\_\_

Place of Election: \_\_\_\_\_ Date: \_\_\_\_\_

Secretary of Elections: \_\_\_\_\_

Tellers: (1) \_\_\_\_\_ (2) \_\_\_\_\_

Presider – Fraternal Witness: \_\_\_\_\_

Spiritual Assistant Witness: \_\_\_\_\_

# Voting: \_\_\_\_\_

### RESULTS OF ELECTION

Minister: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Vice Minister: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Secretary: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Treasurer: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Formation Director: ☐ Elected ☐ Appointed

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Councilor: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Councilor: \_\_\_\_\_ Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

Attested to (Please sign): Secretary of Election: \_\_\_\_\_

Spiritual Assistant Witness: \_\_\_\_\_

Teller (1): \_\_\_\_\_

Teller (2): \_\_\_\_\_

## *The Apostles' Creed*

(To be prayed at the appropriate time  
by the newly elected minister after the Chapter of Elections .)

I believe in God, the Father Almighty,  
Creator of heaven and earth;

and in Jesus Christ, His only Son, our Lord:  
who was conceived by the Holy Spirit,  
born of the Virgin Mary;  
suffered under Pontius Pilate,  
was crucified, died, and was buried.

He descended into hell;  
on the third day He rose again from the dead;  
He ascended into heaven,

And is seated at the right hand of God the Father almighty;  
from there He shall come to judge the living and the dead .

I believe in the Holy Spirit,  
the holy catholic Church,  
the communion of saints,  
the forgiveness of sins,  
the resurrection of the body,  
and life everlasting.  
Amen .

From the “Celebration of the Fraternity”  
Chapter of Elections Reference Guide  
from Saint Margaret of Cortona Region”

## After the Election

1. The installation of the newly elected council takes place immediately.
2. The installation begins when the newly elected minister makes the Profession of Faith by reciting the Apostles' Creed in the name of the entire newly elected council. (Some fraternities have the tradition that all the members of the new council recite the Creed together.)
3. The presider confirms the installation according to the ***Ritual, page 43***, beginning with the words, "May the God of hope..."
4. The Friar Witness begins the common prayer according to the ***Ritual, page 43***, beginning with the words, "Let us pray...."
5. After the common prayer, all come forward to greet and congratulate the newly elected.
6. The ceremony concludes with the blessing by the friar witness.
7. Newly elected officers will see the election secretary as soon as possible. The secretary completes the official election results, including the names, addresses, phones, and e-mail addresses of the newly elected, on The Elections Report Form. Secretary, Tellers, Witness, and Presider will sign the Elections Report Form and Ballot and Vote Count Form.
8. The presider will take a picture of the newly elected council and e-mail it to Mary Lou Coffman, OFS, (marylousfo@gmail.com) for the *Up to Now* regional newsletter.

### NOTES:

1. The presider is responsible for making sure "Ballot and Vote Count Form" (see [page 69](#)) and "Report of Election Form" (see [page 71](#)) are signed by the tellers, secretary, presider and friar witness (or delegate) for the elections. Make sure information is correct.
2. Presider directs the new council to set a date with past council members to meet as soon as possible to transfer records and discuss together important items that the new council should be made aware of.
3. Outgoing treasurer sets a date and time to meet at the bank where the fraternity's checkbook account is established to sign signature cards.

After the "Ballot and Vote Count Form" and the "Report of Election Form" are signed by the presider, witness, election secretary and tellers, the forms are distributed by the presider as follows:

1. The original "Ballot and Vote Count Form" and the "Report of Election Form" stay with the local fraternity for its files
2. One copy of each to the Regional Minister for the region's file\*
3. One copy of each to the local Spiritual Assistant\*
4. One copy of each to the Provincial Spiritual Assistant(s)\*
5. One copy of each to the Regional Spiritual Assistant(s).\*
6. One copy of each to the region's Database Manager – Mary Lou Coffman, OFS, marylousfo@gmail.com\*

\*Scanned or cell phone photos of documents are acceptable, perhaps even preferred.



## **Transition Phase After Elections**

### **Responsibility**

The current council has the responsibility to transition all fraternity documentation and records to the newly elected council after the completion of the Chapter of Elections.

### **Activities**

Each departing council member should transfer all documentation directly to the newly elected member, along with any guidance or instructions about the information. In the case of the treasurer's documentation, the newly elected minister should appoint two members of the fraternity to conduct a review of the books prior to the transfer. This review should include all transactions, bank statements, and receipts since the last approved annual treasurer's report.

### **Support of Past Council Members**

After the elections, the outgoing council members should make themselves available to help the incoming council members become acquainted and up to date on pending matters .

New council members who have not previously been on the council will not be aware of what their council position entails.

Whenever possible, the outgoing council members should make themselves available to help the new council in the transition process.

It is strongly recommended that outgoing council members work, for a period of time with the newly elected members taking over the position of the outgoing council member. It is also strongly recommended that the outgoing council meet with the newly elected council at the first scheduled council meeting.

## **Stipend for Elections**

*According to the Statutes of the National Fraternity of Secular Franciscan Order in the United States of America:*

**Article 18.8.** The local fraternity will present to the Regional Minister or his or her delegate and to the Regional Spiritual Assistant or the representative of the Conference of Regional Spiritual Assistants a stipend appropriate to the journey made and the length of stay required at the time of fraternal and pastoral visits, and also on the occasion of their presiding over and witnessing elections.

Regional Area Councilors - Familiarize yourself with the following:

## Changes in Elected Offices

### Article 31 General Constitutions

1. **Rule 21** "On various levels, each fraternity is animated and guided by a council and minister (or president)." These offices are conferred through elections, in accordance with the Rule, the Constitutions, and their own Statutes. Only by way of exception or in the first phase of their establishment may fraternities exist without a regular council.

The council of the higher level will make the arrangements necessary for this inadequate situation only for the specific amount of time it takes to get a fraternity back on sure footing or to establish a new fraternity to give its leaders the proper formation and to carry out the elections.

2. 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.
3. The leaders of the SFO at every level should 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.
4. The leaders should see to the spiritual and technical preparation and animation of the meetings, both of the fraternities and of the councils. They should seek to inspire life and soul into the fraternities by their own witness, suggesting appropriate means for the development of the life of the fraternity and of apostolic activities in the light of the fundamental Franciscan options. They should see to it that the decisions made are carried out and they should promote collaboration among the brothers and sisters.

## Vacant Offices

### Article 81 General Constitutions

1. When the office of minister remains vacant as a result of death, resignation or other impediment of a definitive character, the vice-minister assumes the office until the end of the term for which the minister was originally elected.
2. If the office of vice-minister becomes vacant, one of the councilors is elected to the office of vice-minister by the council of the fraternity, to serve until the next elective chapter.
3. When the office of councilor becomes vacant, the council will proceed to substitute for him or her in conformity with its own statutes, to serve until the next elective chapter.

## Incompatible Offices

### Article 82 General Constitutions

The following are incompatible:

- a. the office of minister at two different levels;
- b. the offices of minister, vice minister, secretary, and treasurer at the same level.

## Resignation from Office

### Article 83 General Constitutions

1. When a minister of whatever level resigns during a chapter, that same chapter can accept the resignation.

When a minister resigns outside the time of chapter, that resignation must be presented to the council. If the resignation is accepted, it must be confirmed by the minister of the higher level; if the general minister is resigning, the confirmation comes from the Conference of General Ministers of the First Order and the TOR.

2. The resignation of other offices is presented to the minister and to his or her council, who are competent to accept the resignation.

## Removal from Office

### Article 84 General Constitutions

1. In the case in which the minister does not fulfill his or her duties, the council concerned manifests its concerns in a fraternal dialogue with the minister. If this does not produce positive results, the council should inform the council of the higher level whose competence it is to examine the case and, if needed, by secret ballot, decide to remove the minister.
2. For a serious, public, and proved reason, the council of a higher level, after a fraternal dialogue with the person concerned, may, by a secret ballot, order the removal of a minister of a lower level.
3. When there is a serious reason to remove those who hold other offices of the council, it is the responsibility of that council to which they belong to make its decision by a secret ballot after there has been a fraternal dialogue with the person involved.
4. A recourse, which by itself suspends the action to remove someone from office, can be presented within thirty days to the council of the level immediately higher than the one which imposed the sanction.
5. The removal of the general minister belongs to the competence of the Conference of the General Ministers of the First Order and the TOR.
6. When there is a case of serious lack of concern or evidence of irregularities on the part of a minister or a council, the council of the next higher level conducts a fraternal visit of the council in question and, eventually, requests a pastoral visit. With charity and prudence, it will evaluate the circumstances uncovered and decide on the best way to proceed, not excluding the eventual removal of the council or leaders involved.

## Appeal Process

### Article 59 General Constitutions

If anyone is convinced that he or she has been wronged by a measure adopted, that person may appeal within three months to the council above the one that adopted the decision in question and, in successive cases, to further levels all the way up to the Presidency of the International Council of the SFO and, in the final instance, to the Holy See.

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When the council receives a notice to appeal, the secretary will send the member's name and home address to Mary Lou Coffman, OFS, Regional Database Manager at [marylousfo@gmail.com](mailto:marylousfo@gmail.com) as soon as possible. The information will be updated in the Regional and National Databases.

## *Sample Letter*

### **Letter of Introduction as the New Area Councilor**

***(Name of minister or ministers),***

On ***(date)*** at the Franciscan Monastery in Washington, D .C ., I was elected as the Regional Executive Councilor for the ***(name of your area)***. I will be responsible for the following fraternities:

(list the fraternities in your area)

If you are not the current Minister of a fraternity listed above, please let me know and provide the current Minister's name, address, e-mail address and phone numbers, if possible.

I am asking each fraternity to submit the following updates:

- Date of last Fraternity Visitation from the Region
- Date of last Pastoral Visitation from the Region
- Date last attended a Regional Councilors Meeting for your area and who from your fraternity attended if applicable
- Any issues/problems your fraternity is experiencing with which the regional council may be able to help
- If your fraternity has a website, please send me the website address

Please feel free to contact me any time at ***(your e-mail address)*** - Cell: ***(your phone number)*** Home ***(your phone number)***

I am looking forward to working with all of you as we continue our spiritual Franciscan journey .

***(your name and title)***

## Survey for a Fraternity in Distress

### MEMBERSHIP STRENGTH

1. Do you feel comfortable asking colleagues and acquaintances to visit your fraternity?
2. Do you feel that your fraternity offers a wide variety of activities and opportunities to attract prospective members?
3. Do you feel fraternities services projects are worthwhile and rewarding?
4. Do you feel there is sufficient member interest in most fraternity projects?

### COMMUNITY SERVICE IMPACT

1. Do you feel that your fraternity is having an impact on your community
2. Do you feel inspired by how many opportunities your fraternity offers to create an impact in your community?
3. Do you feel your fraternities presence is viable and a major asset in your community?

### MEMBER EXPERIENCE

1. Are your opinions about service fundraising and administration valued?
2. Do you feel that your fraternity meetings and events are spirit filled?
3. Are fraternity members properly recognized for their efforts?
4. Are fraternity members invited to use their talents on at least one committee?
5. Does your fraternity take appropriate time to celebrate and recognize fraternity and member achievements?

### CONCERNS

1. Do you feel that the fraternity is moving in the right direction?
2. What changes would you like to see you to improve the fraternities overall performance?
3. What suggestions or ideas would you like to convey to the council members to improve life in the fraternity?
4. What problems or issues do you see that might hinder the growth of the fraternity at its members?
5. What apostolates would you like to see the fraternity involved in?

### OVERALL INDIVIDUAL RATING (AVERAGE)

0 = Strongly Disagree

1 = Disagree

2 = Neither Agree nor Disagree

3 = Agree

4 = Strongly Agree

## *Spiritual Assistants*



Each fraternity is bonded to a province of either the OFM, OFM Conventual, OFM Capuchin or Third Order Regular (TOR).

### **Article 90 General Constitutions**

18. The principal task of the assistant is to communicate Franciscan spirituality and to co-operate in the initial and continuing formation of the brothers and sisters.
19. The spiritual assistant is by right, with vote, a member of the council of the fraternity to which he or she gives assistance and collaborates with it in all activities. The spiritual assistant does not exercise the right to vote in financial questions.
  - d. the local council requests the assistant from the major superior of the jurisdiction responsible for the assistance.
20. The competent major superior, having heard the council of the fraternity concerned, appoints the assistant according to the norms of these Constitutions and of the Statutes for Spiritual and Pastoral Assistance to the Secular Franciscan Order.

## *Suggested Links for Resources*

Home Page for St. Margaret of Cortona Region – Individual fraternities and their websites can be found here:

<http://saintmargaretofcortona.org/>

National Fraternity of the Secular Franciscan Order:

<https://secularfranciscansusa.org/>

FUN Manual:

<https://saintmargaretofcortona.org/fun-manual/>

Formation Manual:

<http://www.nafra-sfo.org/Formation%20materials/>

US Conference of Catholic Bishops:

[www.USCCB.org](http://www.USCCB.org)

## *Acknowledgments*

**Anne Mulqueen, OFS** – Delegated Regional Spiritual Assistant

**Bob Longo, OFS** – Creator of the Regional Council Members Manual

**Care and Feeding of Councils** – (NAFRA website)

**Chapter of Elections Reference Guide** – Saint Margaret of Cortona Region

**For Up to Now (FUN) Manual** – “Nature of the Secular Franciscan Order” 3-23-2011

**General Constitutions of the Secular Franciscan Order**

**Guidelines for Initial Formation in the Secular Franciscan Order in the United States**

**Mary Lou Coffman, OFS** – For her great editing skills used in preparing this Manual

**NAFRA Form Letters**

**NAFRA Statutes**



# CHAPTER I

## THE SECULAR FRANCISCAN ORDER

### Article 1

1. All the faithful are called to holiness and have a right to follow their own spiritual way in communion with the Church.<sup>1</sup>
2. *Rule 1* There are many spiritual families in the Church with different charisms. Among these families, the Franciscan Family, which in its various branches recognizes St. Francis of Assisi as its father, inspiration, and model, must be included.
3. *Rule 2* From the beginning, the Secular Franciscan Order<sup>2</sup> has had its own proper place in the Franciscan Family. It is formed by the organic union of all the Catholic fraternities whose members, moved by the Holy Spirit, commit themselves through profession to live the Gospel in the manner of St. Francis, in their secular state, following the Rule approved by the Church.<sup>3</sup>
4. The Holy See has entrusted the pastoral care and spiritual assistance of the Secular Franciscan Order (SFO), because it belongs to the same spiritual family, to the Franciscan First Order and Third Order Regular (TOR). These are the "Institutes" who are responsible for the *altius moderamen*, referred to by Canon 303 of the Code of Canon Law.<sup>4</sup>
5. The Secular Franciscan Order is a public association in the Church.<sup>5</sup> It is divided into fraternities at various levels: local, regional, national, and international. Each one has its own juridical personality within the Church.

### Article 2

1. The vocation to the SFO is a specific vocation that gives form to the life and apostolic activity of its members. Therefore, those who are bound by a perpetual commitment to another religious family or institute of consecrated life cannot belong to the SFO.

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<sup>1</sup> See Can. 210; 214; *Lumen Gentium* 40.

<sup>2</sup> It is also called "Secular Franciscan Fraternity", or "Franciscan Third Order" (TOF). See *Rule 2*, footnote 5. Canon 303 of the CCL defines third orders: "Associations whose members live in the world, but share in the spirit of some religious institute, under the overall direction (*altius moderamen*) of the same institute, and who lead an apostolic life and strive for Christian perfection, are known as third orders, or are called by some other suitable title."

<sup>3</sup> After the Rules approved by Pope Nicholas IV in 1289 and by Pope Leo XIII in 1883, the present Rule was approved by Pope Paul VI, June 24, 1978.

<sup>4</sup> See *General Constitutions SFO* 85,2. When the Constitutions are cited without any other specification, the reference is to the present text.

<sup>5</sup> See Can. 116; 301,3; 312; 313.

2. The SFO is open to the faithful of every state of life. The following may belong to it:
  - the laity (men and women);
  - the secular clergy (deacons, priests, bishops).

### Article 3

1. The secular state characterizes the spirituality and the apostolic life of those belonging to the SFO.
2. Their secularity, with respect to vocation and to apostolic life, expresses itself according to the respective state, that is:
  - for the laity, contributing to building up the Kingdom of God by their presence in their life-situations and in their temporal activities;<sup>6</sup>
  - for the secular clergy, by offering to the people of God the service which is properly theirs, in communion with the bishop and the presbytery.<sup>7</sup>
 Both are inspired by the gospel options of Saint Francis of Assisi, committing themselves to continue his mission with the other components of the Franciscan Family.
3. The vocation to the SFO is a vocation to live the Gospel in fraternal communion. For this purpose, the members of the SFO gather in ecclesial communities which are called fraternities.

### Article 4

1. The SFO is governed by the universal law of the Church, and by its own: the Rule, the Constitutions, the Ritual, and the particular statutes.
2. The Rule establishes the nature, purpose, and spirit of the SFO.
3. *Rule 3* The Constitutions have as their purpose:
  - to apply the Rule;
  - to indicate concretely the conditions for belonging to the SFO, its government, the organization of life in fraternity, and its seat.<sup>8</sup>

### Article 5

1. *Rule 3* The authentic interpretation of the Rule and of the Constitutions belongs to the Holy See.
2. The practical interpretation of the Constitutions, with the purpose of harmonizing its application in different areas and at the various levels of the Order, belongs to the General Chapter of the SFO.
3. The clarification of specific points which require a timely decision is the competence of the Presidency of the International Council of the SFO (CIOFS). Such a clarification is valid until the next General Chapter.

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<sup>6</sup> See Can 225, and the Discourse of Pope John Paul II to the SFO, September 27, 1982 in *L'Osservatore Romano*, September 28, 1982.

<sup>7</sup> See Can. 275 ff, *Presbyterorum ordinis* 12; 14; 15 ff.

<sup>8</sup> See Can. 304.

## **Article 6**

1. The international fraternity of the SFO has its own statutes approved by the General Chapter.
2. National fraternities have their own statutes approved by the Presidency of the International Council of the SFO.
3. The regional and the local fraternities may have their own statutes approved by the council of the higher level.

## **Article 7**

All regulations not in accordance with the present Constitutions are abrogated.

## CHAPTER II

### FORM OF LIFE AND APOSTOLIC ACTIVITY

#### Title I

#### THE FORM OF LIFE

##### Article 8

1. The Secular Franciscans commit themselves by their profession to live the Gospel according to Franciscan spirituality in their secular condition.
2. They seek to deepen, in the light of faith, the values and choices of the evangelical life according to the Rule of the SFO:
  - *Rule 7* in a continually renewed journey of conversion and of formation;
  - *Rule 4,3* open to the challenges that come from society and from the Church's life situation, "going from Gospel to life and from life to Gospel;"
  - in the personal and communal dimensions of this journey.

##### Article 9

1. *Rule 5* The spirituality of the Secular Franciscan is a plan of life centered on the person and on the following of Christ,<sup>9</sup> rather than a detailed program to be put into practice.
2. *Rule 4,3* The Secular Franciscan, committed to following the example and the teachings of Christ, must personally and assiduously study the Gospel and Sacred Scripture. The fraternity and its leaders should foster love for the word of the Gospel and help the brothers and sisters to know and understand it as it is proclaimed by the Church with the assistance of the Spirit<sup>10</sup>.

##### Article 10

*Rule 10* "Christ, poor and crucified", victor over death and risen, the greatest manifestation of the love of God for humanity, is the "book" in which the brothers and sisters, in imitation of Francis, learn the purpose and the way of living, loving, and suffering. They discover in Him the value of contradictions for the sake of justice and the meaning of the difficulties and the crosses of daily life. With Him, they can accept the will of the Father even under the most difficult circumstances and live the Franciscan spirit of peace, rejecting every doctrine contrary to human dignity.

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<sup>9</sup> See *Rule* of 1221, Chapt. 22; *Second Letter to All the Faithful* 51.

<sup>10</sup> See *Dei verbum* 10.

## Article 11

Mindful that the Holy Spirit is the source of their vocation and the animator of fraternal life and mission, Secular Franciscans should seek to imitate the faithfulness of Francis to His inspiration. They should listen to the exhortation of the Saint to desire above all things "the Spirit of God at work within them."<sup>11</sup>

## Article 12

1. Gaining inspiration from the example and the writings of Francis and, above all, filled with the grace of the Holy Spirit, each day the brothers and sisters faithfully live the great gift which Christ has given: the revelation of the Father. They should bear witness to this faith before all:
  - in their family life;
  - in their work;
  - in their joys and sufferings;
  - in their associations with all men and women, brothers and sisters of the same Father;
  - in their presence and participation in the life of society;
  - in their fraternal relationships with all creatures.
2. *Rule 10* With Jesus, obedient even to death, they should seek to know and do the will of the Father. They should give thanks to God for the gift of freedom and for the revelation of the law of love. In order to carry out the will of the Father, they should accept the help which is offered to them through the mediation of the Church by those who are constituted as authority in her and by their confreres. They should take on the risk of courageous choices in their life in society with decisiveness and serenity.
3. *Rule 8* The brothers and sisters should love meeting God as His children and they should let prayer and contemplation be the soul of all they are and do. They should seek to discover the presence of the Father in their own heart, in nature, and in the history of humanity in which His plan of salvation is fulfilled. The contemplation of this mystery will dispose them to collaborate in this loving plan.

## Article 13

1. *Rule 7* Secular Franciscans, called in earlier times "the brothers and sisters of penance," propose to live in the spirit of continual conversion. Some means to cultivate this characteristic of the Franciscan vocation, individually and in fraternity, are: listening to and celebrating the Word of God; review of life; spiritual retreats; the help of a spiritual adviser, and penitential celebrations. They should approach the Sacrament of Reconciliation frequently and participate in the communal celebration of it, whether in the fraternity, or with the whole people of God.<sup>12</sup>

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<sup>11</sup> *Rule* of 1223, Chapt. 10.

<sup>12</sup> *Ordo Poenitentiae. Praenotanda* 22 ff.

2. In this spirit of conversion, they should live out their love for the renewal of the Church, which should be accompanied by personal and communal renewal. The fruits of conversion, which is a response to the love of God, are the works of charity in the interactions with the brothers and sisters.<sup>13</sup>
3. Traditional among Franciscan penitents, penitential practices such as fasting and abstinence should be known, appreciated, and lived out according to the general guidelines of the Church.

## Article 14

1. Aware that God wanted to make of us all a single people and that he made his Church the universal sacrament of salvation, the brothers and sisters should commit themselves to a faith-inspired reflection on the Church, its mission in today's world and the role of the Franciscan laity within it. They should take up the challenges and accept the responsibilities that this reflection will lead them to discover.
2. *Rule 8* The Eucharist is the center of the life of the Church. Christ unites us to himself and to one another as a single body in it. Therefore, the Eucharist should be the center of the life of the fraternity. The brothers and sisters should participate in the Eucharist as frequently as possible, being mindful of the respect and love shown by Francis, who, in the Eucharist, lived all the mysteries of the life of Christ.
3. They should participate in the sacraments of the Church, attentive not only to personal sanctification, but also to fostering the growth of the Church and the spreading of the Kingdom. They should collaborate in achieving living and conscious celebrations in their own parishes, particularly in the celebrations of baptism, confirmation, marriage, and the anointing of the sick.
4. The brothers and sisters, as well as the fraternities, should adhere to the indications of the Ritual with respect to the different forms of participating in the liturgical prayer of the Church, giving priority to the celebration of the Liturgy of the Hours<sup>14</sup>.
5. In all places and at all times, it is possible for true worshippers of the Father to give him adoration and to pray to him. Nevertheless, the brothers and sisters should try to find times of silence and recollection dedicated exclusively to prayer.

## Article 15

1. *Rule 11* Secular Franciscans should pledge themselves to live the spirit of the Beatitudes and, in a special way, the spirit of poverty. Evangelical poverty demonstrates confidence in the Father, creates interior freedom, and disposes them to promote a more just distribution of wealth.
2. Secular Franciscans, who must provide for their own families and serve society by means of their work and material goods, have a particular manner of living evangelical poverty. To understand and achieve it requires a strong personal commitment and the stimulation of the

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<sup>13</sup> See *Second Letter to All the Faithful* 25 ff.

<sup>14</sup> *Ritual SFO*, Appendix 26, 27.

fraternity in prayer and dialogue, communal review of life, and attentiveness to the instructions of the Church, and the demands of society.

3. Secular Franciscans should pledge themselves to reduce their own personal needs so as to be better able to share spiritual and material goods with their brothers and sisters, especially those most in need. They should give thanks to God for the goods they have received, using them as good stewards and not as owners.  
They should take a firm position against consumerism and against ideologies and practices which prefer riches over human and religious values and which permit the exploitation of the human person.
4. They should love and practice purity of heart, the source of true fraternity.

## Article 16

1. *Rule 9* Mary, Mother of Jesus, is the model of listening to the Word and of faithfulness to vocation; we, like Francis, see all the gospel virtues realized in her.<sup>15</sup>  
The brothers and sisters should cultivate intense love for the most holy virgin, imitation, prayer, and filial abandonment. They should manifest their own devotion with expressions of genuine faith, in forms accepted by the Church.
2. Mary is the model of fruitful and faithful love for the entire ecclesial community.  
Secular Franciscans and their fraternities should seek to live the experience of Francis, who made the Virgin the guide of his activity. With her, like the disciples at Pentecost, they should welcome the Spirit to create a community of love.<sup>16</sup>

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<sup>15</sup> *Salutation of the Blessed Virgin Mary.*

<sup>16</sup> See 2 *Celano*, 198.

## Title II

### ACTIVE PRESENCE IN THE CHURCH AND IN THE WORLD

#### Article 17

1. *Rule 6* Called to work together in building up the Church as the sacrament of salvation for all and, through their baptism and profession, made "witnesses and instruments of her mission," Secular Franciscans proclaim Christ by their life and words. Their preferred apostolate is personal witness<sup>17</sup> in the environment in which they live and service for building up the Kingdom of God within the situations of this world.
2. The preparation of the brothers and sisters for spreading the Gospel message "in the ordinary circumstances of the world"<sup>18</sup> and for collaborating in the catechesis within the ecclesial communities should be promoted in the fraternities.
3. Those who are called to carry out the mission of catechists, presiders of ecclesial communities, or other ministries, as well as the sacred ministers, should make the love of Francis for the Word of God their own, as well as his faith in those who announce it, and the great fervor with which he received the mission of preaching penance from the Pope.
4. Participation in the service of sanctification, which the Church exercises through the liturgy, prayer, and works of penance and charity, is put into practice by the brothers and sisters above all in their own family, then in the fraternity and, finally, through their active presence in the local Church and in society.

#### For a Just and Fraternal Society

#### Article 18

1. Secular Franciscans are called to make their own contribution, inspired by the person and message of Saint Francis of Assisi, towards a civilization in which the dignity of the human person, shared responsibility, and love may be living realities.<sup>19</sup>
2. *Rule 13* They should deepen the true foundations of universal kinship and create a spirit of welcome and an atmosphere of fraternity everywhere. They should firmly commit themselves to oppose every form of exploitation, discrimination, and exclusion and against every attitude of indifference in relation to others.
3. *Rule 13* They should work together with movements which promote the building of fraternity among peoples: they should be committed to "create worthy conditions of life" for all and to work for the freedom of all people.

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<sup>17</sup> See *Rule* 1221, 17,3; *Legend of the Three Companions* 36; *Second Letter to All the Faithful* 53.

<sup>18</sup> *Lumen Gentium* 35.

<sup>19</sup> See *Gaudium et Spes* 31 ff.



4. Following the example of Francis, patron of ecologists, they should actively put forward initiatives that care for creation and should work with others in efforts that both put a stop to polluting and degrading nature and also establish circumstances of living and environment which would not be a threat to the human person.

## Article 19

1. *Rule 14* Secular Franciscans should always act as a leaven in the environment in which they live through the witness of their fraternal love and clear Christian motivations.
2. In the spirit of minority, they should opt for relationships which give preference to the poor and to those on the fringe of society, whether these be individuals or categories of persons or an entire people; they should collaborate in overcoming the exclusion of others and those forms of poverty that are the fruit of inefficiency and injustice.

## Article 20

1. *Rule 14* Secular Franciscans, committed by their vocation to build the Kingdom of God in temporal situations and activities, live their membership both in the Church and in society as an inseparable reality.
2. As the primary and fundamental contribution to building a more just and fraternal world, they should commit themselves both to the generous fulfillment of the duties proper to their occupation and to the professional training that pertains to it. With the same spirit of service, they should assume their social and civil responsibilities.

## Article 21

1. *Rule 16* For Francis, work is a gift and to work is a grace. Daily work is not only the means of livelihood, but the opportunity to serve God and neighbor as well as a way to develop one's own personality. In the conviction that work is a right and a duty and that every form of occupation deserves respect, the brothers and sisters should commit themselves to collaborate so that all persons may have the possibility to work and so that working conditions may always be more humane.
2. Leisure and recreation have their own value and are necessary for personal development. Secular Franciscans should maintain a balance between work and rest and should strive to create meaningful forms of using leisure time.<sup>20</sup>

## Article 22

1. *Rule 15* Secular Franciscans should "be in the forefront ... in the field of public life." They should collaborate as much as possible for the passage of just laws and ordinances.

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<sup>20</sup> See *Gaudium et Spes* 67; *Laborem exercens* 16 ff.

2. The fraternities should engage themselves through courageous initiatives, consistent with their Franciscan vocation and with the directives of the Church, in the field of human development and justice. They should take clear positions whenever human dignity is attacked by any form of oppression or indifference. They should offer their fraternal service to the victims of injustice.
3. The renunciation of the use of violence, characteristic of the followers of Francis, does not mean the renunciation of action. However, the brothers and sisters should take care that their interventions are always inspired by Christian love.

## Article 23

1. *Rule 19* Peace is the work of justice and the fruit of reconciliation and of fraternal love.<sup>21</sup> Secular Franciscans are called to be bearers of peace in their families and in society:
  - they should see to the proposal and spreading of peaceful ideas and attitudes;
  - they should develop their own initiatives and should collaborate, individually and as a fraternity, with initiatives of the Pope, the local Churches, and the Franciscan Family;
  - they should collaborate with those movements and institutions which promote peace while respecting its authentic foundations.
2. While acknowledging both the personal and national right to legitimate defense, they should respect the choice of those who, because of conscientious objection, refuse to bear arms.
3. To preserve peace in the family, the brothers and sisters should, in due time, make a last will and testament for the disposition of their goods.

## In the Family

## Article 24

1. *Rule 17* Secular Franciscans should consider their own family to be the first place in which to live their Christian commitment and Franciscan vocation. They should make space within it for prayer, for the Word of God, and for Christian catechesis. They should concern themselves with respect for all life in every situation from conception until death.  
Married couples find in the Rule of the SFO an effective aid in their own journey of Christian life, aware that, in the sacrament of matrimony, their love shares in the love that Christ has for his Church. The way spouses love each other and affirm the value of fidelity is a profound witness for their own family, the Church, and the world.
2. In the fraternity:
  - the spirituality of the family and of marriage and the Christian attitude towards family problems should be a theme for dialogue and for the sharing of experiences;
  - they should share the important moments of the family life of their Franciscan brothers and sisters and they should give fraternal attention to those — single, widows, single parents, separated, divorced — who are living difficult situations;
  - *Rule 19* they should create conditions suitable for dialogue between generations;
  - the formation of groups of married couples and of family groups should be fostered.

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<sup>21</sup> See *Gaudium et Spes* 78.

3. The brothers and sisters should collaborate with the efforts undertaken in the Church and in society to affirm both the value of fidelity and respect for life and to provide answers to the social problems of the family.

## Article 25

Out of the conviction of the need to educate children to take an interest in community, "bringing them the awareness of being living, active members of the People of God"<sup>22</sup> and because of the fascination which Francis can exercise on them, the formation of groups of children should be encouraged. With the help of a pedagogy and an organization suitable to their age, these children should be initiated into a knowledge and love of the Franciscan life. National statutes will give appropriate orientation for the organization of these groups and their relationship to the fraternity and to Franciscan youth groups.

## Messengers of Joy and Hope

## Article 26

1. Even in suffering, Francis experienced confidence and joy from:
  - the experience of the fatherhood of God;
  - the invincible faith of rising with Christ to eternal life;
  - the experience of being able to meet and praise the Creator in the universal fraternity of all creatures.<sup>23</sup>

*Rule 19* Following the Gospel, Secular Franciscans, therefore, affirm their hope and their joy in living. They make a contribution to counter widespread distress and pessimism, preparing a better future.

2. In the fraternity, the brothers and sisters should promote mutual understanding and they should see to it that the atmosphere of their meetings is welcoming and that it reflects joy. They should encourage one another for the good.

## Article 27

1. *Rule 19* The brothers and sisters, progressing in age, should learn to accept illness and increasing difficulties and to give a deeper sense to their life. This should be undertaken with increasing detachment as they set out for the Promised Land. They should be firmly convinced that the community of those who believe in Christ and who love one another in Him will go forward into eternal life as the "communion of saints."
2. Secular Franciscans should commit themselves to create in their environment and, above all, in their fraternities, a climate of faith and hope so that "Sister Death" may be regarded as a passage to the Father, and all may prepare themselves with serenity.

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<sup>22</sup> *Apostolicam actuositatem* 30.

<sup>23</sup> See 2 *Celano*, 125; *Legend of Perugia* 43; *Major Life*, 9.

## CHAPTER III

### LIFE IN FRATERNITY

#### Title I

### GENERAL ORIENTATIONS

#### Article 28

1. The fraternity of the SFO finds its origin in the inspiration of Saint Francis of Assisi to whom the Most High revealed the essential gospel quality of life in fraternal communion.<sup>24</sup>
2. *Rule 20* "The SFO is divided 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 SFO shall also support the commitment of the fraternities in their service to the world, and specifically to the life of society.
3. The brothers and sisters gather in local fraternities established in connection with a church or a religious house, or in personal fraternities, constituted for specific and valid reasons recognized in the decree of establishment.<sup>25</sup>

#### Article 29

1. 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 co-ordinated 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 SFO.
2. *Rule 20* These fraternities, that each have their own juridical personality in the Church, should acquire, if possible, a civil juridical personality for the better fulfillment of their mission. It pertains to the national councils to give guidelines concerning the motivations and the procedures to be followed.
3. National statutes should indicate the criteria for the organization of the SFO in the nation. The application of these criteria is left to the prudent judgement of the leaders of the fraternities concerned and of the national council.

#### Article 30

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<sup>24</sup> See *Constitutions* 3,3; *Testament* 14.

<sup>25</sup> See Can. 518.

1. The brothers and sisters are co-responsible for the life of the fraternity to which they belong and for the SFO as the organic union of all fraternities throughout the world.
2. The sense of co-responsibility of the members requires personal presence, witness, prayer, and active collaboration, in accordance with each one's situation and possible obligations for the animation of the fraternity.
3. *Rule 25* In a family spirit, each brother and sister should make a contribution to the fraternity fund, according to each one's means, to provide the financial means needed for the life of the fraternity and for its religious, apostolic, and charitable works. The brothers and sisters ought to 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.

## Article 31

1. *Rule 21* "On various levels, each fraternity is animated and guided by a council and minister (or president)." These offices are conferred through elections, in accordance with the Rule, the Constitutions, and their own Statutes. Only by way of exception or in the first phase of their establishment may fraternities exist without a regular council. The council of the higher level will make the arrangements necessary for this inadequate situation only for the specific amount of time it takes to get a fraternity back on sure footing or to establish a new fraternity; to give its leaders the proper formation and to carry out the elections.
2. 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.
3. The leaders of the SFO at every level should 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.
4. The leaders should see to the spiritual and technical preparation and animation of the meetings, both of the fraternities and of the councils. They should seek to inspire life and soul into the fraternities by their own witness, suggesting appropriate means for the development of the life of the fraternity and of apostolic activities in the light of the fundamental Franciscan options. They should see to it that the decisions made are carried out and they should promote collaboration among the brothers and sisters.

## Article 32

1. The ministers and councilors should live and foster the spirit and reality of communion among the brothers and sisters, among the various fraternities, and between them and the Franciscan family. They should, above all, cherish peace and reconciliation in and around the fraternity.

2. *Rule 21* The ministers' and councilors' task to lead is temporary. The brothers and sisters, rejecting all ambition, should show love for the fraternity with a spirit of service, prepared both to accept and to relinquish the office.

## Article 33

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 be promoted. The plurality of expressions of the Franciscan ideal and cultural variety must be respected.
2. The councils of higher levels should not do what can be adequately carried out either by the local fraternities or by a council of a lower level. They should respect and promote their vitality so that they fulfil their duties properly. The local fraternities and councils concerned should 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.

## Article 34

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 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.

## Article 35

1. Secular priests who recognize that they are called by the Spirit to participate in the charism of Saint Francis of Assisi within the secular fraternity should find in it specific attention in conformity with their mission among the People of God.
2. Secular Franciscan priests may also gather in personal fraternities in order to pursue the ascetical and pastoral incentives which the life and doctrine of Francis and the Rule of the SFO offer them to live their vocation in the Church better. It is proper that these fraternities have their own statutes which envision concrete forms for their composition, their fraternal meetings and for spiritual formation as well as for making their communion with the whole Order living and functional.

## Article 36

1. The brothers and sisters who commit themselves with private vows to live in the spirit of the beatitudes and to make themselves more disposed to contemplation and to the service of the fraternities, can be a great help in the spiritual and apostolic development of the SFO.

2. These brothers and sisters may gather in groups according to statutes approved by the national council, or when these groups spread beyond the borders of a nation, by the Presidency of the International Council of the SFO.
3. Such statutes should be in harmony with the present Constitutions.

## **Title II**

### **ENTRANCE INTO THE ORDER AND FORMATION**

#### **Article 37**

1. *Rule 23* Membership in the Order is attained through a time of initiation, a time of formation, and the profession of the Rule.
2. The journey of formation, which should develop throughout life, begins with entrance into the fraternity. Mindful that the Holy Spirit is the principal agent of formation and always attentive to collaboration with Him, those responsible for formation are: the candidate, the entire fraternity, the council with the minister, the master of formation, and the assistant.
3. The brothers and sisters are responsible for their own formation, developing in an ever more perfect way the vocation received from the Lord. The fraternity is called to help the brothers and sisters in this journey by means of a warm welcome, prayer, and example.
4. The elaboration and adoption of means of formation, adapted to the local situations and offered as a help to those responsible for formation in the individual fraternities, belong to the national and regional councils in common agreement.

#### **The Time of Initiation**

#### **Article 38**

1. *Rule 23* The time of initiation is a phase preparatory to the true and proper time of formation and is intended for the discernment of the vocation and for the reciprocal acquaintance between the fraternity and the aspiring member. It should guarantee the freedom and the seriousness of entrance into the SFO.
2. The duration of the time of initiation and the forms employed in its development are established by the national statutes.
3. It belongs to the fraternity council to decide possible exemptions to this time of initiation, keeping in mind the guidelines of the national council.

#### **Admission to the Order**

#### **Article 39**

1. *Rule 23* The request for admission to the Order is presented by the aspirant to the minister of a local or personal fraternity by a formal act, in writing if possible.



2. Conditions for admission are: to profess the Catholic faith, to live in communion with the Church, to be of good moral standing, and to show clear signs of a vocation.<sup>26</sup>
3. The council of the fraternity decides collegially on the request, gives a formal answer to the aspirant, and communicates this to the fraternity.
4. The rite of admission is performed according to the Ritual.<sup>27</sup> The act is to be registered and preserved in the records of the fraternity.

### **The Time of Formation**

#### **Article 40**

1. *Rule 23* The time of formation lasts at least one year. The national statutes can establish a longer period. The purpose of this period is the maturation of the vocation, the experience of the evangelical life in fraternity, and a better knowledge of the Order. This formation should be carried out with frequent meetings for study and prayer and with concrete experiences of service and of apostolate. These meetings should be held, as far as possible and opportune, in common with the candidates of other fraternities.
2. The candidates are guided to read and meditate on Sacred Scripture, to come to know the person and writings of Francis and of Franciscan spirituality, and to study the Rule and Constitutions. They are trained in a love for the Church and acceptance of her teaching. The laity practice living their secular commitment in the world in an evangelical way.
3. Participation in the meetings of the local fraternity is an indispensable presupposition for initiation into community prayer and into fraternity life.
4. A style of teaching which is Franciscan in character and which fits the mentality of the persons concerned should be adopted.

### **The Profession or Promise of Evangelical Life**

#### **Article 41**

1. *Rule 23* Having completed the time of initial formation, the candidate submits to the minister of the local fraternity a request to make his or her profession. Having heard the master of formation and the assistant, the fraternity council decides by secret ballot on the admission to profession, gives its reply to the candidate, and informs the fraternity.
2. The conditions for the profession or promise of evangelical life are:
  - attainment of the age established by the national statutes;
  - active participation in the time of formation for at least one year;
  - the consent of the council of the local fraternity.

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<sup>26</sup> See Can. 316.

<sup>27</sup> See *Ritual SFO*, Preface n. 10 ff.; Chapt. I.

3. Where it is held to be opportune to lengthen the time of formation, it must not be extended to more than a year beyond the time established by the national statutes.

## Article 42

1. Profession is the solemn ecclesial act by which the candidate, remembering the call received from Christ, renews the baptismal promises and publicly affirms his or her personal commitment to live the Gospel in the world according to the example of Francis and following the Rule of the SFO.
2. *Rule 23* Profession incorporates the candidate into the Order and is by its nature a perpetual commitment. Perpetual profession, because of objective and specific pedagogical reasons, may be preceded by a temporary profession, renewable annually. The total time of temporary profession may not be longer than three years.<sup>28</sup>
3. Profession is accepted by the minister of the local fraternity or by his or her delegate in the name of the Church and of the SFO. The rite is carried out according to the norms of the Ritual.<sup>29</sup>
4. Profession does not only commit those professed to the fraternity, but also, in the same way, it commits the fraternity to be concerned with their human and religious well-being.
5. The act of profession is registered and preserved in the records of the fraternity.

## Article 43

The national statutes establish:

- *Rule 23* the minimum age for profession which, however, may not be less than eighteen years completed;
- the distinctive sign of membership in the Order (the "Tau" or other Franciscan symbol).

## Continuing Formation

## Article 44

1. Begun by the preceding stages, the formation of the brothers and sisters takes place in a permanent and continuous way. It should be understood as an aid in the conversion of each<sup>30</sup> and everyone and in the fulfillment of their proper mission in the Church and in society.
2. The Fraternity has the duty to give special attention to the formation of the newly professed and of the temporarily professed, to help them become fully mature in their vocation and develop a true sense of belonging.

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<sup>28</sup> See *Ritual SFO*, Preface n. 18.

<sup>29</sup> See *Ritual SFO*, Preface n. 13 ff.; Part I, Chapter II.

<sup>30</sup> See *Constitutions* 8; *I Celano* 103.

3. Ongoing formation – accomplished by means of courses, gatherings, and the sharing of experience – aims to assist the brothers and sisters:
  - *Rule 4* in listening to and meditating on the Word of God, "going from Gospel to life and from life to Gospel;"
  - in reflecting on events in the Church and in society in the light of faith, and with the help of the documents of the teaching Church, consequently taking consistent positions;
  - in discerning and deepening the Franciscan vocation by studying the writings of Saint Francis, Saint Clare and Franciscan authors.

## **Promotion of Vocations**

### **Article 45**

1. The promotion of vocations to the Order is a duty of all the brothers and sisters and is a sign of the vitality of the fraternities themselves.  
The brothers and sisters, convinced of the validity of the Franciscan way of life, should pray that God may give the grace of the Franciscan vocation to new members.
2. Although nothing can substitute for the witness of each member and of the fraternity, the councils must adopt appropriate means to promote the Secular Franciscan vocation.

## **Title III**

### **THE FRATERNITY AT THE VARIOUS LEVELS**

#### **The Local Fraternity**

##### **Article 46**

1. *Rule 22* The canonical establishment of the local fraternity belongs to the competent religious major superior at the request of the brothers and sisters concerned and with the prior consultation and collaboration of the council of the higher level to which the new fraternity will be related according to the national statutes.  
The written consent of the local Ordinary is necessary for the canonical establishment of a fraternity outside the houses or churches of the Franciscan religious of the First Order or the TOR.<sup>31</sup>
2. For the valid establishment of a local fraternity, at least five perpetually professed members are required. The admission and profession of these first brothers and sisters will be received by the council of another local fraternity or by the council of a higher level which will have provided for their formation in appropriate ways. The acts of admission and profession and the decree of establishment are preserved in the records of the fraternity. Copies are sent to the council of the higher level.
3. If there is not yet a fraternity of the SFO in a nation, it belongs to the Presidency of the International Council of the SFO to make provision in this regard.

##### **Article 47**

1. *Rule 22* Each local fraternity, the primary cell of the one SFO, is entrusted to the pastoral care of the religious Franciscan Order that canonically established it.
2. A local fraternity may pass to the pastoral care of another religious Franciscan Order in the ways determined by the national statutes.

##### **Article 48**

1. In the case of cessation of a fraternity, the patrimonial goods of the same, the library and the records are acquired by the fraternity of the immediately higher level.
2. In the case of revival according to the canonical laws, the fraternity will repossess any remaining goods, its own library, and records.

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<sup>31</sup> See Can. 312.

## The Fraternity Council

### Article 49

1. The council of the local fraternity is composed of the following offices: minister, vice-minister, secretary, treasurer, and master of formation. Other offices may be added according to the needs of each fraternity. The spiritual assistant of the fraternity forms part of the council by right.<sup>32</sup>
2. The fraternity, meeting in an assembly or chapter, discusses questions regarding its own life and organization. Every three years, in an elective assembly or chapter, the fraternity elects the minister and the council in the way established by the Constitutions and statutes.

### Article 50

1. It is the duty of the council of the local fraternity:
  - to promote the initiatives necessary for fostering fraternal life, for improving the human, Christian, and Franciscan formation of its members and for sustaining their witness and commitment in the world;
  - to make concrete and courageous choices, appropriate for the situation of the fraternity, from among the numerous activities possible in the field of the apostolate.
2. The duties of the council are also:
  - a. to decide on the acceptance and admission to profession of new brothers and sisters;<sup>33</sup>
  - b. to establish a fraternal dialogue with members in particular difficulties and to adopt consequent measures;
  - c. to receive the request for withdrawal and to decide on the suspension of a member from the fraternity;
  - d. to decide on the establishment of sections or groups in conformity with the Constitutions and the statutes;
  - e. to decide on the destination of available funds and, in general, to deliberate on matters concerning financial management and the economic affairs of the fraternity;
  - f. to assign duties to the councilors and to the other professed members;
  - g. to request from the competent superiors of the First Order and the TOR suitable and prepared religious as assistants;
  - h. to perform such other duties as are required by these Constitutions or which are necessary to carry out its proper purposes.

## The Offices in the Fraternity

### Article 51

1. While firmly upholding the co-responsibility of the council to animate and guide the fraternity, the minister, as the primary person responsible for the fraternity, is expected to

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<sup>32</sup> See *Constitutions* 90,2.

<sup>33</sup> See *Constitutions* 39, 3; 41, 1.

make sure that the directions and the decisions of the council are put into practice and will keep the council informed about what he or she is doing.

2. The minister also has the following duties:
  - a. to call, to preside at, and to direct the meetings of the fraternity and council; to convoke, every three years, the elective chapter of the fraternity, having heard the council on the formalities of the convocation;
  - b. to prepare the annual report to be sent to the council of the higher level after it has been approved by the council of the fraternity;
  - c. to represent the fraternity in all its relations with ecclesiastical and civil authorities. When the fraternity acquires a juridical personality in the civil order, the minister becomes, when possible, its legal representative;
  - d. to request, with the consent of the council, the pastoral and fraternal visits, at least once every three years.
  - e. to put into effect those acts which the Constitutions refer to his or her competence.

## Article 52

1. The vice-minister has the following duties:
  - a. to collaborate in a fraternal spirit and to support the minister in carrying out his or her specific duties;
  - b. to exercise the functions entrusted by the council and/or by the assembly or chapter;
  - c. to take the place of the minister in both duties and responsibilities in case of absence or temporary impediment;
  - d. to assume the functions of the minister when the office remains vacant.<sup>34</sup>
2. The secretary has the following duties:
  - a. to compile the official acts of the fraternity and of the council and to assure that they are sent to their respective proper recipients;
  - b. to see to the updating and preservation of the records and the registers, noting admissions, professions, deaths, withdrawals, and transfers from the fraternity;<sup>35</sup>
  - c. to provide for the communication of the more important facts to the various levels and, if appropriate, to provide for their dissemination through the mass media.
3. The master of formation has the following duties:
  - a. to co-ordinate, with the help of the other members of the council, the formative activities of the fraternity;
  - b. to instruct and enliven the inquirers during the time of initiation, the candidates during the period of initiation formation, and the newly professed;
  - c. to inform the council of the fraternity prior to profession, concerning the suitability of the candidate for a commitment to live according to the Rule.
4. The treasurer, or bursar, has the following duties:

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<sup>34</sup> See *Constitutions* 81,1.

<sup>35</sup> Each local fraternity is to have at least a register of enrollments (admissions, professions, transfers, deaths, and every other important annotation relative to the individual members), the register of minutes of the council and the register of administration.

- a. to guard diligently the contributions received, recording each receipt in the appropriate register, with the date on which it was given, the name of the contributor, or the one from whom it was collected;
  - b. to record in the same register the items of expense, specifying the date and the purpose, in conformity with the directions of the fraternity council;
  - c. to render an account of his or her administration to the assembly and to the council of the fraternity according to the norms of the national statutes.
5. The provisions regarding the rights and duties of the vice-minister, the secretary and the treasurer apply, with the appropriate adaptations, to all levels.

## **Participation in the Life of the Fraternity**

### **Article 53**

1. *Rule 24* The fraternity must offer to its members opportunities for coming together and collaborating through meetings to be held with as great a frequency as allowed by the situation and with the involvement of all its members.
2. *Rule 6; 8* The fraternity should come together periodically, also as an ecclesial community to celebrate the Eucharist in a climate which strengthens the fraternal bond and characterizes the identity of the Franciscan family. Where, for whatever reason, this particular celebration may not be possible, they should participate in the celebration of the larger ecclesial community.
3. Insertion into a local fraternity and participation in fraternity life is essential for belonging to the SFO. Appropriate initiatives should be adopted according to the directives of the national statutes, to keep those brothers and sisters united to the fraternity who — for valid reasons of health, family, work, or distance — cannot actively participate in community life.
4. The fraternity remembers with gratitude its brothers and sisters who have passed away and continues its communion with them by prayer and in the Eucharist.
5. The national statutes can indicate special forms of association with the fraternity for those who, without becoming a member of the SFO, want to participate in its life and activities.

### **Article 54**

1. In cases where the fraternity of whatever level has property or real estate at its disposal, the procedures necessary for that fraternity to acquire a juridical personality in the civil order must be followed in conformity with the national statutes.
2. Based on the respective civil legislation, the national statutes must establish precise criteria regarding the purpose of the juridical person, the administration of its material goods and the relevant internal controls. They must also contain instructions so that the establishing document may provide for the disposal of its property in case the juridical person ceases to exist.

3. The national statutes must also set up precise criteria for local fraternities that possess or administer property or real estate, so that the respective council, before its term of office is finished, has the fraternity's financial and real estate situation audited either by an expert who is not a member of the council or by the fraternity's board of examiners.

## **Transfer**

### **Article 55**

If a brother or sister, for any reasonable cause, desires transfer to another fraternity, he or she first informs the council of the fraternity to which he or she belongs and then makes the request, including the reasons for the transfer, to the minister of the fraternity to which he or she wishes to belong. The council makes its decision after having received the necessary information in writing from the fraternity of origin.

## **Temporary Provisions**

### **Article 56**

1. *Rule 23* Members who find themselves in difficulty may ask, with a formal act, temporary withdrawal from the fraternity. The council will evaluate the request with love and prudence, after a fraternal dialogue between the minister and the assistant with the person concerned. If the reasons appear to be well founded, after the brother or sister in difficulty has been given time to reconsider, the council agrees to the request.
2. The repeated and prolonged default in the obligations of the life of the fraternity and other conduct in serious opposition to the Rule have to be discussed by the council in dialogue with the person at fault. Only in the case of obstinacy or relapse may the council decide, with a secret vote, to suspend someone. It communicates its decision in writing to the person concerned.
3. Voluntary withdrawal or the provision for suspension must be noted in the registers of the fraternity. It involves exclusion from the meetings and activities of the fraternity, including the right of active and passive voice, but membership in the Order itself is not affected.

### **Article 57**

1. In the case of voluntary withdrawal or of suspension from the fraternity, the Secular Franciscan may ask to be readmitted by addressing an appropriate written request to the minister.
2. After examining the reasons offered by the person involved, the council evaluates whether the causes which led to the withdrawal or suspension can be considered as overcome. If the conclusion is affirmative, it readmits him or her and the decision is recorded in the proceedings of the fraternity.



## **Definitive Provisions**

### **Article 58**

1. The brother or sister who intends to withdraw definitively from the Order, communicates so in writing to the minister of the fraternity. The minister and the assistant of the local fraternity, with charity and prudence, discuss the matter with the person concerned and keep the Council informed. If the brother or sister confirms the decision in writing, the Council takes notice and communicates it in writing to the person concerned. The definitive withdrawal is recorded in the register of the fraternity and communicated to the council of the higher level.
2. In case of serious causes, provided that they are external, imputable, and juridically proven, the minister and the assistant of the local fraternity, with charity and prudence, discuss the matter with the brother or sister concerned and keep the council informed. The brother or sister is given time to reflect and to discern, eventually with the help of an external and competent expert. If the time set aside for reflection passes without any result, the council of the fraternity requests the council of the higher level to dismiss the brother or sister from the Order. The request must be accompanied by all the documentation relative to the case. The council of the higher level will issue the decree of dismissal after having collegially examined the request with the relative documentation and having verified observance of the directives of the Law and of the Constitutions.
3. The brother or sister who publicly rejects the faith, or defects from ecclesiastical communion, or upon whom an excommunication is imposed or declared, by the fact itself ceases to be a member of the Order. This does not mean, however, that the council of the fraternity should not discuss the matter with the person concerned or offer fraternal help. The council of a higher level, upon request of the council of the local fraternity, collects the proofs and officially declares that the person has ceased to be a member of the Order.
4. The decree of dismissal or the declaration that the person has ceased to be a member of the Order, in order to become effective, must be confirmed by the national council to whom all the documentation will be sent.

### **Article 59**

If anyone is convinced that he or she has been wronged by a measure adopted, that person may appeal within three month to the council above the one that adopted the decision in question and, in successive cases, to further levels all the way up to the Presidency of the International Council of the SFO and, in the final instance, to the Holy See.

### **Article 60**

What is said in these Constitutions with respect to the local fraternities is valid, to the extent that it is applicable, for the personal fraternities also.

## **The Regional Fraternity**

### **Article 61**

1. The regional fraternity is the organic union of all the local fraternities existing in a territory or which can be integrated into a natural unity, either by geographic proximity, or by common problems and pastoral circumstances. It assures the link between the local fraternities and the national fraternity in respect to the unity of the SFO and in accord with the cooperative efforts of the Franciscan religious orders to provide spiritual assistance within the area.
2. It is for the national council to compose the regional fraternity according to the Constitutions and to the national statutes. The competent religious superiors, from whom spiritual assistance must be sought, should be informed of it.
3. The regional fraternity:
  - is animated and guided by council and a minister;
  - is ruled by the national statutes and by its own statutes;
  - has its own seat.

### **Article 62**

1. The regional council is constituted according to the provisions of the national statutes and of its own regional statutes. At the heart of the regional council there can be set up an executive council (or board) whose duties are determined by those same statutes.
2. The regional council has the following duties:
  - a. to prepare the celebration of the elective chapter;
  - b. to promote, animate, and co-ordinate the life and activities of the SFO and its insertion into the local Church within the regional area;
  - c. to detail the action plan of the SFO within the region according to the directives of the national council and in collaboration with it and to publicize that program to the local fraternities;
  - d. to communicate the directives of the national council and of the local Church to the local fraternities;
  - e. to provide for the formation of those responsible for animation;
  - f. to offer to local fraternities activities which support their formative and operative needs;
  - g. to discuss and approve the annual report to the national council;
  - h. to schedule, when circumstances recommend so, the fraternal visit to the local fraternities, even if it is not requested;
  - i. to make decisions regarding the use of available funds and, in general, to deliberate on matters regarding the financial management and the economic affairs of the regional fraternity;
  - j. to have, before its term of office is finished, the regional fraternity's financial and real estate situation audited either by an expert who is not a member of the council or by the fraternity's board of examiners;
  - k. to perform such other duties as are indicated by the Constitutions or necessary to achieve its own aims.

## Article 63

1. While firmly preserving the co-responsibility of the council for the animation and guidance of the regional fraternity, 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.
2. In addition, the regional minister has the duty:
  - a. to convoke and preside at the meetings of the regional council; to convoke every three years the elective chapter of the fraternity after having listened to the council on the formalities of the convocation;
  - b. to preside at and to confirm the elections of the local fraternities either in person or through a delegated member of the regional council, with the exception of the spiritual assistant;
  - c. to make fraternal visits to the local fraternities, personally or through a delegate who is a member of the council;
  - d. to participate in the meetings called by the national council;
  - e. to represent the fraternity whenever it has acquired a juridical personality in the civil order;
  - f. to prepare the annual report to the national council;
  - g. to request the pastoral and fraternal visits with the consent of the council, at least once every three years.

## Article 64

The regional chapter is the representative organ of all the fraternities existing within the confines of a regional fraternity, with elective and deliberative power.

The national statutes provide for the formalities of convocation, its composition, frequency and powers.

## The National Fraternity

## Article 65

1. The national fraternity is the organic union of the local fraternities existing within the territory of one or more states which are joined and co-ordinated among themselves through regional fraternities, wherever they exist.
2. It is the duty of the Presidency of the International Council of the SFO to provide for the establishment of new national fraternities upon request and in dialogue with the councils of the fraternities concerned. The competent religious superiors of the nation, of whom spiritual assistance will be requested, should be informed.
3. The national fraternity:
  - is animated and guided by a council and a minister;
  - is governed by its own statutes;
  - has its own seat.

## Article 66

1. The national council is constituted according to the provisions of the national statutes. At the heart of the national council there can be set up an executive council (or board) whose duties are determined by those same statutes.
2. The national council has the duty:
  - a. to prepare the celebration of the national elective chapter, according to its own statutes;
  - b. to make known and to promote the Secular Franciscan spirituality in the whole area of its own national fraternity;
  - c. to decide upon programs of annual activities of a national character;
  - d. to seek, indicate, publish, and distribute the necessary instruments for the formation of the Secular Franciscans;
  - e. to animate and co-ordinate the activities of the regional councils;
  - f. to maintain the connection with the Presidency of the International Council of the SFO;
  - g. to make sure that the national fraternity be represented in the international council and to assume the responsibility for the expenses involved;
  - h. to discuss and approve the annual report to Presidency of the International Council of the SFO;
  - i. to see to the presence of the SFO in the ecclesial bodies at the national level;
  - j. to schedule, when circumstances recommend so, the fraternal visit to the regional and local fraternities, even if it is not requested;
  - k. to make decisions regarding the management of the available funds and, in general, regarding the economic affairs of the fraternity;
  - l. to have, before its term of office is finished, the national fraternity's financial and real estate situation audited either by an expert who is not a member of the council or by the fraternity's board of examiners;
  - m. to perform such other duties as are indicated by the Constitutions or necessary to achieve its own aims.

## Article 67

1. While firmly preserving the co-responsibility of the council for the animation and guidance of the national fraternity, 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.
2. In addition, the national minister has the duty:
  - a. to convoke and preside at the meetings of the national council; to convoke every three years the elective chapter of the national fraternity, according to the national statutes, after having listened to the council on the formalities of the convocation;
  - b. to direct and co-ordinate with the national leaders the activities at the national level;
  - c. to give a report to the national council and chapter on the life and activity of the SFO in the country;
  - d. to represent the national fraternity in contacts with ecclesiastical and civil authorities. When the national fraternity has a civil juridical personality, its legal representation belongs to the minister;
  - e. to preside at and to confirm the elections of the regional fraternities either in person or through a delegated member of the national council, with the exception of the spiritual assistant;

- f. to make fraternal visits to the regional councils, personally or through a delegate who is a member of the national council;
- g. to request the fraternal and pastoral visits, with the consent of the council, at least once every six years.

## **Article 68**

1. The national chapter is the representative organ of the fraternities existing within the confines of a national fraternity. It has legislative, deliberative, and elective powers. In conformity with the Rule and the Constitutions, it may make legislative decisions and give norms valid within its national confines. The national statutes determine the composition of the national chapter, its frequency, its powers, and how to convoke it.
2. The national statutes may envisage other forms of meetings and assemblies to promote the life and apostolate at the national level.

## **The International Fraternity**

## **Article 69**

1. The international fraternity is constituted by the organic union of all the Catholic Secular Franciscan fraternities in the world. It is identical to the SFO. It has its own juridical personality within the Church. It is organized and it functions in conformity with the Constitutions and its own statutes.
2. The international fraternity is guided and animated by the International Council of the SFO (CIOFS), with its seat in Rome (Italy), by its Presidency and by the general minister or international president.

## **Article 70**

1. The international council is composed of the following members, elected according to the norms of the Constitutions and its own statutes:
  - professed brothers and sisters of the SFO;
  - representatives of the Franciscan Youth.In addition, the four General Assistants to the SFO form part of the international council.
2. The Presidency of the International Council of the SFO is constituted within the international council of which it forms an integral part.
3. The International Council convened in General Chapter is the highest governing body of the SFO with legislative, deliberative, and elective powers. It can make legislative decisions and give norms in conformity with the Rule and the Constitutions.
4. The international council meets every six years in elective general chapter, and at least once between two elective general chapters, according to the norms established by the Constitutions and by the international statutes.

## Article 71

1. The purposes and duties of the International Council of the SFO are:
  - a. to promote and sustain the evangelical life according to the spirit of Saint Francis of Assisi within the secular condition of the faithful living throughout the world;
  - b. to increase the sense of unity of the SFO while respecting the pluralism of the persons and groups, and to strengthen the bond of communion, collaboration, and sharing among the national fraternities;
  - c. to harmonize the sound traditions, according to the original nature of the SFO, with advances in theological, pastoral, and legislative fields, with a view to a specific evangelical Franciscan formation;
  - d. to contribute, in line with the tradition of the SFO, to the spreading of ideas and initiatives which are valuable for promoting the availability of Secular Franciscans in the life of the Church and of society;
  - e. to determine the orientations and establish priorities for the actions of its Presidency;
  - f. to interpret the Constitutions according to article 5,2.
2. The international statutes specify the composition of the international council and how to convoke its meetings.

## Article 72

1. The Presidency of the International Council of the SFO is composed of:
  - the general minister;
  - the vice-minister;
  - the presidency councilors;
  - a member of the Franciscan Youth;
  - the general assistants of the SFO.
2. The presidency councilors are elected according to the international statutes, which determine their number and the areas represented.

## Article 73

The duties and tasks of the Presidency are:

- a. to see that the decisions and orientations of the general chapter are carried out;
- b. to co-ordinate, animate, and guide the SFO at the international level, in order to make the interdependence and reciprocity of the SFO a reality at the various levels of fraternity;
- c. to intervene in a spirit of service, according to the circumstances, providing fraternal aid in the clarification and resolution of grave and urgent problems of the SFO, informing the national council concerned and the next general chapter;
- d. to strengthen reciprocal relationships of collaboration between the SFO and the other components of the Franciscan family at the world level;
- e. to organize meetings or assemblies, according to the norms of the international statutes, to promote the life and the apostolate of the SFO at the international level;
- f. to collaborate with organizations and associations which defend the same values;
- g. to fulfill the other duties indicated in the Constitutions or needed in order to reach its own proper goals.

## Article 74

1. While firmly preserving the co-responsibility of the Presidency of the International Council of the SFO in the guidance and animation of the international fraternity, it belongs to the general minister, who has the primary responsibility, to see that the directions and decisions of the general chapter and of the Presidency are put into practice and to inform them concerning his or her activities.
2. In addition, the general minister has the duty:
  - a. to convoke and preside at the meetings of the Presidency according to its own statutes;
  - b. to convoke the meetings of the general chapter, with the consent of the Presidency, and to preside at them;
  - c. to be a visible and effective sign of the communion and life-giving reciprocity between the SFO and the general ministers of the Franciscan First Order and the TOR, among whom he or she represents the SFO, and to preserve the bond with the conference of general assistants;
  - d. to represent the SFO at the world level before ecclesiastical and civil authorities. When the international fraternity has a civil juridical personality, its legal representation belongs to the minister;
  - e. to make the fraternal visit to the national councils, personally or through a delegate;
  - f. to preside at the elections of the national councils, personally or through a delegate;
  - g. to request, with the consent of the Presidency, the pastoral visit by the Conference of the General Ministers of the First Order and the TOR;
  - h. to intervene in urgent cases, informing the Presidency of them;
  - i. to sign the official documents of the international fraternity;
  - j. to exercise, with the consent of the Presidency, the property rights of the international fraternity together with another councilor of the Presidency designated by that same body;
  - k. before every general chapter, have the financial and property situation of the international fraternity verified by a qualified accountant who is not involved in the economic and financial management of the Presidency.

## Article 75

The specific duties of the international councilors are determined by the international statutes.

## **Title IV**

### **ELECTION TO AND TERMINATION OF OFFICES**

#### **Elections**

#### **Article 76**

1. The elections at the various levels will take place according to the norms of the law of the Church<sup>36</sup> and of the Constitutions.  
The convocation should be carried out at least one month in advance, indicating the place, the day, and the time of the election.
2. The elective assembly, or chapter, will be presided over by the minister of the immediately higher level, or by his or her delegate, who confirms the election.  
The president or the delegate cannot preside over the elections in his or her local fraternity, nor the elections of the council of a higher level, of whose council he or she is a member.  
The spiritual assistant of the immediately higher level or his delegate is to be present as a witness of the communion with the First Order and the TOR.  
A representative of the Conference of General Ministers of the First Order and the TOR presides at and confirms the elections of the Presidency of the International Council of the SFO.
3. The president of the chapter and the assistant of the higher level do not have the right to vote.
4. The president of the chapter designates, among the members of that chapter, a secretary and two tellers.

#### **Article 77**

1. In the local fraternity, the perpetually professed of the same fraternity have active voice, that is can elect, and passive voice, that is can be elected. The temporarily professed have only active voice.
2. At the other levels, the following have active voice: the secular members of the outgoing council, the representatives of the immediately lower level and of the Franciscan Youth, if professed. It belongs to the particular statutes to establish more concrete norms in application of the preceding norm, taking care to assure the broadest elective base. The perpetually professed Secular Franciscans of the corresponding area have passive voice.
3. Both the national and the international statutes – each for its own area – can establish objective qualifications regarding who can be elected to the various offices.

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<sup>36</sup> See Can. 164 ff.



4. The presence of more than half of the number of those having the right to vote is required for the valid celebration of an elective chapter. For the local level, the national Statutes can establish a different norm.

## Article 78

1. An absolute majority of the votes of those present, cast in secret, is required for the election of the minister. After two inconclusive ballots, the voting continues between the two candidates who have obtained the largest number of votes or, in case there are more than two, between the two candidates who are oldest by profession. If there is still a tie after the third ballot, the older by profession will be considered elected.
2. The election of the vice-minister proceeds in the same manner.
3. For the election of the councilors, after a first ballot without an absolute majority, a relative majority of the votes of those present, cast in secret, is sufficient, unless the particular statutes require a greater majority.
4. The secretary announces the result of the elections; the president confirms the election according to the Ritual<sup>37</sup> if all has been carried out properly and those elected have accepted their office.

## Article 79

1. The minister and vice-minister may be elected for two consecutive terms of three years each. For a third and final successive election to the office of minister or vice-minister, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary.
2. The out-going minister cannot be elected vice-minister.
3. The councilors may be elected for additional successive terms of three years. Beginning with the third successive election, a majority of two-thirds of the votes of those present, which must be obtained on the first ballot, will be necessary.
4. The general minister, vice-minister and presidency councilors can only be elected for two consecutive terms of six years.
5. The council of the higher level has the right and duty to invalidate the elections and to call them anew in all cases of inobservance of the preceding norms.

## Article 80

The particular statutes may include further directives concerning elections, as long as they are not contrary to the Constitutions.

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<sup>37</sup> See *Ritual SFO*, Part II, Chapt. II.

## **Vacant Offices**

### **Article 81**

1. When the office of minister remains vacant as a result of death, resignation or other impediment of a definitive character, the vice-minister assumes the office until the end of the term for which the minister was originally elected.
2. If the office of vice-minister becomes vacant, one of the councilors is elected to the office of vice-minister by the council of the fraternity, to serve until the next elective chapter.
3. When the office of councilor becomes vacant, the council will proceed to substitute for him or her in conformity with its own statutes, to serve until the next elective chapter.

## **Incompatible Offices**

### **Article 82**

The following are incompatible:

- a. the office of minister at two different levels;
- b. the offices of minister, vice-minister, secretary and treasurer at the same level.

## **Resignation of Office**

### **Article 83**

1. When a minister of whatever level resigns during a chapter, that same chapter can accept the resignation.  
When a minister resigns outside the time of chapter, that resignation must be presented to the council. If the resignation is accepted, it must be confirmed by the minister of the higher level; if the general minister is resigning, the confirmation comes from the Conference of General Ministers of the First Order and the TOR.
2. The resignation of other offices is presented to the minister and to his or her council, who are competent to accept the resignation.

## **Removal**

### **Article 84**

1. In the case in which the minister does not fulfill his or her duties, the council concerned manifests its concerns in a fraternal dialogue with the minister. If this does not produce positive results, the council should inform the council of the higher level whose competence it is to examine the case and, if needed, by secret ballot, decide to remove the minister.

2. For a serious, public, and proved reason, the council of a higher level, after a fraternal dialogue with the person concerned, may, by a secret ballot, order the removal of a minister of a lower level.
3. When there is a serious reason to remove those who hold other offices of the council, it is the responsibility of that council to which they belong to make its decision by a secret ballot after there has been a fraternal dialogue with the person involved.
4. A recourse, which by itself suspends the action to remove someone from office, can be presented within thirty days to the council of the level immediately higher than the one which imposed the sanction.
5. The removal of the general minister belongs to the competence of the Conference of the General Ministers of the First Order and the TOR.
6. When there is a case of serious lack of concern or evidence of irregularities on the part of a minister or a council, the council of the next higher level conducts a fraternal visit of the council in question and, eventually, requests a pastoral visit. With charity and prudence, it will evaluate the circumstances uncovered and decide on the best way to proceed, not excluding the eventual removal of the council or leaders involved.

## Title V

### SPIRITUAL AND PASTORAL ASSISTANCE OF THE SFO

#### Article 85

1. As an integral part of the Franciscan family and called to live the charism of Francis within the secular dimension, the SFO has particular and close relations to the First Order and the TOR<sup>38</sup>.
2. The spiritual and pastoral care of the SFO, entrusted by the Church to the Franciscan First Order and the TOR, is the duty, above all, of their general and provincial ministers. The *altius moderamen*, of which Canon 303 speaks, belongs to them. The purpose of the *altius moderamen* is to guarantee the fidelity of the SFO to the Franciscan charism, communion with the Church and union with the Franciscan family, values which represent a vital commitment for the Secular Franciscans.

#### Article 86

1. The general and provincial ministers exercise their office with respect to the SFO through:
  - the establishment of fraternities;
  - the pastoral visits;
  - the spiritual assistance to the fraternities at the various levels.
 They may exercise this office personally or through a delegate.
2. This service of the religious ministers completes but does not substitute for the secular councils and ministers to whom belong the guidance, co-ordination, and animation of the fraternities at the various levels.

#### Article 87

1. For all that concerns the SFO as a whole, the *altius moderamen* must be exercised by the general ministers collegially.
2. It belongs to the Conference of General Ministers of the First Order and the TOR:
  - a. to take care of the relations with the Holy See concerning the approval of the legislative or liturgical documents, which need to be approved by the Holy See;
  - b. to visit the Presidency of the International Council of the SFO;
  - c. to confirm the election of the Presidency of the International Council of the SFO.

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<sup>38</sup> From Franciscan history and from the Constitutions of the First Order and the TOR, it is clearly evident that these Orders recognize that they are committed to the spiritual and pastoral assistance of the SFO in virtue of their common origin and charism and by the will of the Church. See Constitutions OFM, 60; Constitutions OFM Conv., 116; Constitutions OFM Cap., 95; Constitutions TOR, 157; Rule of the Third Order of Pope Leo XIII, 3,3; Rule approved by Paul VI, 26.

3. Each general minister, for his own Order, sees to the interest of the religious for the SFO and to their preparation for service to it according to the respective Constitutions and the Constitutions of the SFO.

## **Article 88**

1. The provincial ministers and the other major superiors, in the area of their own jurisdiction, guarantee the spiritual assistance to the local fraternities entrusted to the jurisdiction. They see to it that their own religious are interested in the SFO and that capable and well-prepared persons are appointed for the service of spiritual assistance.
2. It is the specific competence of the major superiors, in name of their jurisdiction:
  - a. to establish, canonically, new local fraternities and guarantee them spiritual assistance;
  - b. to animate spiritually and visit the local fraternities assisted by their own jurisdiction;
  - c. to keep themselves informed on the spiritual assistance given to the SFO.
3. The major superiors are responsible for the spiritual assistance to the local fraternities which they have established.
4. The major superiors with jurisdiction in the same territory, are to establish together the most adequate means to guarantee spiritual assistance to local fraternities which, because of causes beyond their control, could remain without such assistance.
5. The major superiors with jurisdiction in the same territory, are to establish together the most adequate means for carrying out collegially their mission with respect to the regional and national fraternities of the SFO.

## **Article 89**

1. By virtue of the vital reciprocity between the religious and the secular members of the Franciscan Family and in regard to the responsibilities of major superiors, spiritual assistance to the fraternities of the SFO at all levels must be assured as a fundamental element of communion.
2. The spiritual assistant is the person designated by the competent major superior to carry out this service for a specific fraternity of the SFO.
3. To be a witness of Franciscan spirituality and of the fraternal affection of the religious towards the Secular Franciscans, and to be a bond of communion between his Order and the SFO, the spiritual assistant should be a Franciscan religious, member of the First Order or the TOR.
4. When it is not possible to give such a spiritual assistant to the fraternity, the competent major superior can entrust the service of spiritual assistance to:
  - a. religious brothers or sisters of other Franciscan institutes;
  - b. diocesan clerics or other persons, specially prepared for such service, who are members of the SFO;
  - c. other diocesan clerics or non-Franciscan religious.

5. The previous authorization of the superior or the local ordinary, when needed, does not exempt the Franciscan major superior of the responsibility for the quality of the pastoral service and of the spiritual assistance given.

## Article 90

1. The principal task of the assistant is to communicate Franciscan spirituality and to co-operate in the initial and continuing formation of the brothers and sisters.
2. The spiritual assistant is by right, with vote, a member of the council of the fraternity to which he or she gives assistance and collaborates with it in all activities. The spiritual assistant does not exercise the right to vote in financial questions.
3. Specifically:
  - a. the general assistants give their service to the Presidency of the International Council of the SFO, form a conference, and collegially see to the spiritual assistance to the SFO as a whole;
  - b. the national assistants give their service to the national council, see to the spiritual assistance to the SFO in the whole territory of the national fraternity and, at the national level, to the co-ordination of the regional assistants. If they are more than one, they form a conference and give their service collegially;
  - c. the regional assistants give their service to the regional council and see to the spiritual assistance to the regional fraternity. If they are more than one, they form a conference and give their service collegially;
  - d. the local assistants give their service to the local fraternity and its council.

## Article 91

1. The council of the fraternity at each level requests suitable and prepared assistants from the competent superiors of the First Order and the TOR.
2. Specifically:
  - a. the Presidency of the International Council of the SFO requests the general assistant from the respective general minister;
  - b. the national council requests the national assistant from the major superior, indicated collegially by the major superiors with jurisdiction in the territory of the national fraternity;
  - c. the regional council requests the assistant from the major superior, indicated collegially by the major superiors with jurisdiction in the territory of the regional fraternity;
  - d. the local council requests the assistant from the major superior of the jurisdiction responsible for the assistance.
3. The competent major superior, having heard the council of the fraternity concerned, appoints the assistant according to the norms of these Constitutions and of the *Statutes for Spiritual and Pastoral Assistance to the Secular Franciscan Order*.

## **Title VI**

### **THE FRATERNAL VISIT AND THE PASTORAL VISIT**

#### **Article 92**

1. *Rule 26* The purpose of both the pastoral and fraternal visits is to revive the evangelical Franciscan spirit, to assure fidelity to the charism and to the Rule, to offer help to fraternity life, to reinforce the bond of the unity of the Order, and to promote its most effective insertion into the Franciscan family and the Church.
2. With the consent of the appropriate council, the request for the fraternal visit as well as for the pastoral visit is made:
  - a. by the minister of the local and regional fraternity, at least every three years, to the council of the immediately higher level and to the respective conference of spiritual assistants;
  - b. by the national minister, at least every six years, to the Presidency of the International Council of the SFO and to the conference of general assistants;
  - c. by the general minister, at least every six years, to the Conference of General Ministers.
3. For urgent and serious reasons or in case of failure on the part of the minister or the council to request it, the fraternal and pastoral visit may be carried out upon the initiative of the respectively competent council or conference of spiritual assistants.

#### **Article 93**

1. In the visits to the local fraternities and to the councils at the various levels, the visitor will verify the evangelical and apostolic vitality, the observance of the Rule and Constitutions, and the insertion of the fraternities into the Order and into the Church.
2. In the visits to the local fraternities and to the councils at the various levels, the visitor will in time communicate the object and the program of the visit to the interested council. He or she will examine the registers and the records, including those relative to the preceding visits, to the election of the council and to the administration of goods.

The visitor will draw up a report of the visit carried out, appending it to the records in the appropriate register of the fraternity visited, and will inform the council of the level which has held the visit.
3. In the visit to the local fraternity, the visitor will meet with the entire fraternity and with the groups and sections into which it is divided. He or she will give special attention to the brothers and sisters in formation and to those brothers and sisters who may request a personal meeting. Where required, he or she will proceed to the fraternal correction of the shortcomings eventually encountered.
4. If it is useful for the service of the fraternity, the two visitors, secular and religious, may make the visit at the same time, agreeing beforehand on the program, in a way most consonant with the mission of each of them.

5. The fraternal and pastoral visits, carried out by the immediately higher level, do not deprive the visited fraternity of the right to appeal to the council or to the conference of spiritual assistants of a higher level.

## **The Fraternal Visit**

### **Article 94**

1. The fraternal visit is a moment of communion, an expression of the service and concrete interest of the secular leaders at the various levels, so that the fraternity may grow and be faithful to its vocation.<sup>39</sup>
2. Among the various initiatives to achieve the purpose of the visit, the visitor will give special attention:
  - to the validity of the formation, both initial and permanent;
  - to the relations entertained with other fraternities at the different levels, with Franciscan youth, and with the entire Franciscan family.
  - to the observance of the directives and of the guidelines of the International Council of the SFO and of the other councils;
  - to the presence in the local Church.
3. The visitor will check the report of the previous audit or verification of the financial and property management of the Council, the register of the accounts and every document pertaining to the property of the fraternity and, if applicable, the condition of the juridical personality in the civil order, including the fiscal aspects. In the absence of the required audit of the financial and property management of the council, the visitor can commission such an audit, to be paid by the visited fraternity, to an expert who is not a member of the council concerned. Wherever he or she deems it opportune, the visitor will obtain the assistance of a competent person in these aspects.
4. The visitor will check the records of the election of the council. He or she will evaluate the quality of the service offered to the fraternity by the minister and by the other leaders, and will study with them the solution to problems which may arise.  
If, for whatever reason, he or she should find that their service does not meet the needs of the fraternity, the visitor will promote appropriate initiatives, taking into account also the provisions concerning resignation and removal from office, given special circumstances<sup>40</sup>.
5. The visitor may not carry out the visit of his or her own local fraternity, nor of the council of another level of which he or she is a member.

## **The Pastoral Visit**

### **Article 95**

1. The pastoral visit is a privileged moment of communion with the First Order and the TOR. It is carried out also in the name of the Church and serves to guarantee and promote the observance of the Rule and the Constitutions and fidelity to the Franciscan charism. The visit is carried out with respect to the organization and the law proper to the SFO itself.

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<sup>39</sup> Cfr. *Constitutions* 51,1c; 63,2g; 67,2g.

<sup>40</sup> Cfr. *Constitutions* 83; 84.



2. Having verified the canonical establishment of the fraternity, the visitor will give attention to the relations between the fraternity and its spiritual assistant and the local Church. The visitor will meet the pastors (bishop or parish priest) when this is opportune for fostering communion and service for building up the Church.
3. The visitor will promote collaboration and a sense of co-responsibility among the secular leaders and the religious assistants. The visitor is to examine the quality of the spiritual assistance given to the visited fraternity, encourage the spiritual assistants in their service and promote their continuing spiritual and pastoral formation.
4. The visitor will give special attention to programs, methods and experiences of formation, to the liturgical and prayer life, and to the apostolic activities of the fraternity.

## **Title VII**

### **THE FRANCISCAN YOUTH**

#### **Article 96**

1. The SFO, by virtue of its very vocation, ought to be ready to share its experience of evangelical life with the youth who feel attracted to Saint Francis of Assisi and to seek the means of adequately presenting it to them.
2. The Franciscan Youth (YouFra), as understood by these Constitutions and in so far as the SFO considers itself to be particularly responsible for it, 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.
3. The members of the Franciscan Youth consider the Rule of the SFO as an inspirational document for the growth of their own Christian and Franciscan vocation either individually or in a group. After a suitable period of formation, of at least one year, they confirm this option with a personal pledge before God and in the presence of the brothers and sisters.
4. The members of the Franciscan Youth who wish to belong to the SFO should satisfy the requirements of the Rule, the Constitutions, and the Ritual of the SFO.
5. The Franciscan Youth has a specific organization, methods of formation, and teaching methods adequate for the needs of the world of youth, according to the existing realities in the various countries. The national statutes of the Franciscan Youth should be approved by the respective national council of the SFO, or in its absence, by the Presidency of the International Council of the SFO.
6. The Franciscan Youth, as a component of the Franciscan family, requests from the competent secular leaders and religious superiors, respectively, fraternal animation and spiritual assistance.

#### **Article 97**

1. The SFO fraternities will promote the vocation to the Franciscan Youth by means of appropriate and dynamic initiatives. They should see to the vitality and the expansion of the Franciscan Youth fraternities and will accompany the youth in their journey of human and spiritual growth with proposals for specific activities and contents.
2. The SFO fraternities commit themselves to give to the Franciscan Youth fraternities a fraternal animator, who together with the spiritual assistant and the council of the Franciscan Youth guarantees an adequate Secular Franciscan formation.

3. To promote a close communion with the SFO, all leaders of the Franciscan Youth at the international level and at least two members of the national council of the Franciscan Youth are to be professed Secular Franciscan youth.
4. A representative of the Franciscan Youth is to be designated by his or her council to form part of the SFO council of the corresponding level; a representative of the SFO, 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 SFO council only if he or she is a professed Secular Franciscan
5. The representatives of the Franciscan Youth in the international council of the SFO are elected according to the international statutes which also determine how many there are, what fraternities they represent, and what their responsibilities are supposed to be.

## **Title VIII**

### **IN COMMUNION WITH THE FRANCISCAN FAMILY AND THE CHURCH**

#### **Article 98**

1. *Rule 1* Secular Franciscans should seek to live in life-giving reciprocal communion with all the members of the Franciscan family. They should be ready to promote common initiatives or participate in them with the religious of the First, Second and Third Orders, with Secular Institutes, and with other lay ecclesial groups that recognize Francis as a model and inspiration in order to work together to spread the Gospel, remove the causes of marginalization, and serve the cause of peace.
2. They must cultivate a special affection, which expresses itself in concrete initiatives of fraternal communion, towards the sisters of the contemplative life who, like Saint Clare of Assisi, bear witness in the Church and in the world and by whose mediation they expect the abundance of grace for the fraternity and for the works of the apostolate.

#### **Article 99**

1. *Rule 6* As a living part of the people of God and inspired by the Seraphic Father, the Secular Franciscans, "living in full communion with the Pope and the bishops", should seek to know and deepen the doctrine proposed by the teaching Church through its more important documents and they should be attentive to the presence of the Holy Spirit who vivifies the faith and charity of the people of God.<sup>41</sup> They should collaborate in the initiatives promoted by the Holy See, in a particular way in those areas in which they are called to work by virtue of their secular Franciscan vocation.
2. The SFO, as an international public association, is connected by a special bond to the Roman Pontiff from whom it has received the approval of its Rule and the confirmation of its mission in the Church and in the world.

#### **Article 100**

1. The vocation to "rebuild" the Church ought to induce the brothers and sisters sincerely to love and to live the union with the local Church in which they develop their own vocation and realize their apostolic commitment, aware that in the diocese the Church of Christ is truly functioning<sup>42</sup>.
2. The Secular Franciscans should fulfil with dedication the duties with which they are occupied in their relations to the local Church. They should lend their help to activities of the apostolate

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<sup>41</sup> *Lumen Gentium* 12.

<sup>42</sup> *Christus Dominus* 11; Can. 396; See 2 *Celano* 10; 1 *Celano* 18.

as well as to the social activities existing in the diocese.<sup>43</sup> In the spirit of service, they should make themselves present, as the fraternity of the SFO, within the life of the diocese. They should be ready to collaborate with other ecclesial groups and to participate in pastoral councils.

3. Fidelity to their own charism, Franciscan and secular, and the witness of building fraternity, sincerely and openly, are their principal services to the Church, which is the community of love. They should be recognized in it by their "being," from which their mission springs.

## Article 101

1. The Secular Franciscans should collaborate with the bishops and follow their directions in so far as they are the moderators of the ministry of the Word and of the Liturgy and the co-ordinators of the various forms of apostolate in the local Church.<sup>44</sup>
2. The fraternities are subject to the vigilance of the Ordinary in so far as they perform their activities within the local Churches.<sup>45</sup>

## Article 102

1. The fraternities established in a parish church should seek to co-operate in the animation of the parochial community, in the liturgy and in fraternal relations. They should integrate themselves into the pastoral apostolate as a whole, with preference for those activities more congenial to the Secular Franciscan tradition and spirituality.
2. In the parishes entrusted to Franciscan religious, the fraternities constitute the mediation and the secular witness of the Franciscan charism in the parochial community through their exercise of the fruitful life-giving reciprocity. Therefore, united with the religious, they see to the spreading of the gospel message and of the Franciscan lifestyle.

## Article 103

1. Remaining faithful to their own identity, the fraternities will take care to make the most of each occasion for prayer, formation, and active collaboration with other ecclesial groups. They should welcome with pleasure those who, without belonging to the SFO, wish to share its experiences and activities.
2. The fraternities will promote, wherever possible, fraternal relations with non-Catholic associations inspired by Francis.

Approved by the Vatican December 8, 2000

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<sup>43</sup> See Can. 311.

<sup>44</sup> See Can. 394; 756; 775 ss.

<sup>45</sup> See Can. 305; 392.

# **Statutes of the National Fraternity of the Secular Franciscan Order in the United States of America**

## **Introduction**

We, the National Fraternity of the Secular Franciscan Order in the United States of America, called to follow Christ in the footsteps of St. Francis of Assisi, in order to provide for the life of the Order and specifically for its organization and function, do establish and adopt these *Statutes*.

All regulations not in accordance with these present *National Statutes* are abrogated [cf. *General Constitutions of the Secular Franciscan Order* (hereafter *General Constitutions*), article #7].

## **Section I**

### **Organization and Structure**

#### **Article 1. National Fraternity**

The National Fraternity of the Secular Franciscan Order in the United States of America (hereafter NAFRA)

1. is a juridic person [cf. *Code of Canon Law*, canons #116 and #117] made up of the Regional and Local Fraternities of the Secular Franciscan Order (hereafter SFO) [legal title for the international body is *Ordo Franciscanus Saecularis* (OFS)] existing within the United States [cf. *Rule of the Secular Franciscan Order* (hereafter *Rule*), article #2; *General Constitutions*, articles #1.5 and #65.1; *Code of Canon Law*, canons #214 and #303];
2. is animated and guided by a Council and Minister who are duly elected;
3. is organized and functions in conformity with the *Code of Canon Law*, and the following SFO documents: the *Rule*, the *General Constitutions*, the *Ritual*, the *International Statutes* and these *National Statutes* [cf. *General Constitutions*, article #4.1].

## Article 2. Governing Body

1. The governing body of NAFRA is the National Fraternity Council. The National Executive Council acts on behalf of the National Fraternity Council when the members of the entire Council are not in session [cf. *General Constitutions*, article #66.1].
2. The Conference of National Spiritual Assistants exercises pastoral care and spiritual guidance in regard to NAFRA as one of the integral component parts of the SFO by suitable means including participation in deliberations of its governing body [cf. *Statutes for Spiritual and Pastoral Assistance to the Secular Franciscan Order* (hereafter *Statutes for Spiritual Assistance*), articles #19 and #20].

## Article 3. National Fraternity Council

1. The National Fraternity Council is composed of the Regional Ministers, the National Executive Council, and the members of the Conference of National Spiritual Assistants.
2. The business of the National Fraternity of the Secular Franciscan Order in the United States of America shall be conducted by the National Fraternity Council.
3. In addition, the National Fraternity Council has legislative, deliberative and elective powers; in conformity with the *Rule* and the *General Constitutions*, it may make legislative decisions and produce norms valid within its national confines.
4. The regular meeting of the National Fraternity shall be the annual meeting of the National Fraternity Council convoked by the National Minister, which convocation shall provide for at least two months' advance notice.
5. The National Fraternity Council meets in elective chapter every three years; the National Minister convokes this meeting at least two months in advance, indicating the place, the day and the time of the election.
6. If considered necessary by the National Executive Council, or when at least one-third of the Regional Ministers requests it, the National Fraternity Council may meet at other times during any year.
7. In addition to the duties enumerated in article #66.2 of the *General Constitutions*, the National Fraternity Council has the following duties:
  - a. To compose and approve modifications to boundaries of Regional Fraternities (see appendix A);

- b. To set the fair share amount of annual financial contributions to NAFRA from the Regional Fraternities.

#### Article 4. Structure for Property Control

1. In accordance with article #54 of the *General Constitutions*, NAFRA is incorporated under the laws of the United States of America, State of Ohio, as "The National Fraternity of the Secular Franciscan Order - U.S.A." and has its statutory office at 1615 Vine Street, Cincinnati, Ohio 45202.
2. The elected officers of the National Fraternity Council shall function as the officers of the corporation.
3. Upon the termination of existence of the corporation, all assets, real and personal, tangible and intangible, along with its library and records, shall become the property of the "juridic person immediately superior" [cf. *Code of Canon Law*, canon #123].
4. NAFRA is the organic union of all Local and Regional Secular Franciscan Fraternities located within the United States of America and is itself incorporated. Therefore, no Local or Regional Fraternity may itself incorporate without the specific written prior approval of NAFRA. Because of the usual requirement to incorporate for the purpose of owning real estate, no Local or Regional Fraternity may acquire real estate without the specific written prior approval of NAFRA.
5. In accord with article #54.3 of the *General Constitutions*, for the fraternities at each level, a financial audit must be done every 3 years, just prior to the end of the Council's term of office. This audit may be conducted by a professional accountant who is not a member of the fraternity Council, or by a "board of examiners" established by the particular fraternity (consisting of two or more experts selected at large by the membership who are not also members of that fraternity's Council). A written report of such audit must be given to the Council of the higher fraternity.

#### Article 5. National Executive Council

1. Between the meetings of the National Fraternity Council, an elected National Executive Council shall carry on the business and carry out the purposes of the National Fraternity in a spirit of ministry and service [cf. *General Constitutions*, article #66.1].
2. The National Executive Council is composed of the National Minister, the National Vice Minister, the National Secretary, the National Treasurer, at least one elected Councilor, and the International Councilor. The President of the Conference of National Spiritual Assistants is by right a member of this Council. The Chair(s) of the National Formation Commission and the



National Justice, Peace and Integrity of Creation (“JPIC”) Commission may attend meetings of the National Executive Council.

3. All members of the National Executive Council have voting rights. The Chair(s) of the National Formation Commission and the National Justice, Peace and Integrity of Creation (“JPIC”) Commission exercise a consultative role.
4. Election of the members of the National Executive Council shall proceed in accordance with **Section II** of this document.
5. The duties of the National Executive Council are:
  - a. To form, animate, guide and coordinate the SFO at the national level;
  - b. To see that the decisions of the National Fraternity Council are carried out;
  - c. To provide practical and pastoral interpretations and to clarify specific points in the *National Statutes*, with validity until the next meeting of the National Fraternity Council;
  - d. To resolve urgent problems which may arise that were not encompassed in the *General Constitutions* or *National Statutes*, until the next meeting of the National Fraternity Council;
  - e. To intervene to resolve serious and urgent problems in a spirit of reconciliation when requested by a Regional Fraternity Council or on the National Executive Council’s own initiative;
  - f. To hear appeals from decisions of dismissal from membership rendered by Regional Executive Councils where appropriate [cf. *General Constitutions*, article #59];
  - g. To establish and direct commissions and committees deemed necessary to achieve the goals and objectives determined by the National Fraternity Council;
  - h. To present to the representative of the International Fraternity and the representative of the Conference of General Spiritual Assistants a stipend appropriate to the journey made and the length of stay required at the time of fraternal and pastoral visits, and also on the occasion of their presiding over and witnessing elections;
  - i. To administer the financial affairs of NAFRA, including events not foreseen in the annual budget approved at the annual meeting of

the National Fraternity Council, such extraordinary (non-budgeted) expenditures not to exceed five per cent (5%) of the annual budget.

6. When not in session, the National Executive Council may conduct business electronically (i.e., via e-mail, telephone, fax, etc.), provided that any decisions and determinations made in this way are reviewed and ratified at the next regular meeting of the Council.

#### Article 6. Duties of Officers of the National Executive Council

1. The National Minister, in addition to the duties enumerated in article #67 of the *General Constitutions*, has the following duty:

To approve when necessary extraordinary (non-budgeted) expenditures, not to exceed one per cent (1%) of the annual NAFRA budget.

2. The National Vice Minister's duties are enumerated in article #52.1 of the *General Constitutions*.

3. The National Secretary, in addition to the duties enumerated in article #52.2 of the *General Constitutions*, has the following duty:

To maintain and supervise the archives of the National Fraternity in accordance with instructions of the National Executive Council.

4. The National Treasurer, in addition to the duties enumerated in article #52.4 of the *General Constitutions*, has the following duties:

- a. To ensure the deposit of all funds of the National Fraternity which may come into the hands of the National Treasurer into such bank accounts in the name of NAFRA as the National Executive Council shall designate;
- b. To provide for the payment of monies as the business of the National Fraternity may require as approved in the annual budget or on the order of the National Minister or the National Executive Council. All payments are to be made by check.
- c. To submit an annual budget to the National Executive Council for its review, and to the National Fraternity Council for its review and approval at the annual meeting.
- d. To be responsible for the financial books and records of NAFRA. Upon the written request of any member of the National Fraternity

Council to the Treasurer, these financial records shall be open for inspection.

- e. To provide the National Fraternity Council with financial reports of receipts, expenditures, and balances in NAFRA's treasury throughout the year, and at the beginning of each year, to provide a written statement of receipts, expenditures and balances in NAFRA's treasury for the preceding year.
- 5. The International Councilor's duties are enumerated in article #75 of the *General Constitutions* and article #7 of the *International Statutes*.
- 6. The President of the Conference of National Spiritual Assistants, in addition to the duties enumerated in article #90 of the *General Constitutions*, has the following duties:
  - a. To attend meetings of the National Fraternity Council and of the National Executive Council, of which he is a member by right, collaborating with these bodies in all their activities;
  - b. To act collegially with the other National Spiritual Assistants to coordinate spiritual assistance on the national level and to cooperate in the initial and continuing formation of the brothers and sisters [cf. *General Constitutions*, article #90.3b; *Statutes for Spiritual Assistance*, article #19];
  - c. To vote in all matters which come before these bodies for decision except for financial matters and in elective chapters.

## **Section II**

### **Voting and Conduct of Business**

#### **Article 7. Convocation**

- 1. The regular meeting of the National Fraternity shall be the annual meeting of the National Fraternity Council called by the National Minister.
- 2. The National Executive Council shall meet at least twice during the period between annual meetings of the National Fraternity Council.
- 3. The National Fraternity Council shall meet in elective chapter once every three years.
- 4. The National Fraternity shall celebrate a National Congress at least once every five years, at a time and place determined by the National Executive

Council and confirmed by the National Fraternity Council.

5. The Minister of each Regional Fraternity shall receive at least two months' notice of the place, day and time of the annual National Fraternity Council meeting.

#### Article 8. Voting Rights

1. All members of the National Fraternity Council as defined in article #3.1 of these *National Statutes* may vote. No Spiritual Assistant at any level, however, shall vote on any question involving financial matters [cf. *General Constitutions*, article #90.2] or in elective chapters [cf. *General Constitutions*, article #77; *Statutes for Spiritual Assistance*, article #12.3]. This restriction applies to Secular Franciscans as well as religious friars and sisters serving as Spiritual Assistants for a particular Secular Franciscan fraternity.
2. The Minister of each Regional Fraternity has the primary responsibility for casting the vote of the Regional Fraternity in all elections and on all business that may come before the National Fraternity Council.
3. Substitutes/Delegates
  - a. In the event a Regional Minister is impeded from attending the National Fraternity Council meeting, then the delegate of the Regional Fraternity shall automatically be the Regional Vice Minister pursuant to the provisions of article #52.1.c of the *General Constitutions*.
  - b. If both the Regional Minister and the Regional Vice Minister are so impeded, then a member of the Regional Executive Council selected by that body shall attend and exercise all of the powers of a delegate for the Regional Fraternity.
4. No Regional Fraternity may cast more than a single vote on any issue or in any election.
5. Even if a person has a right to vote in his or her own name by more than one title, such person may cast only one ballot [cf. *Code of Canon Law*, canon #168].
6. During those meetings of the National Fraternity Council at which elections occur, the members of the outgoing and of the incoming National Executive Council, upon election and even prior to formal installation, are members with full rights of the National Fraternity Council until the end of said meeting.

#### Article 9. Quorum; Majority; Counting Ballots; Procedure

1. No official business may be transacted at a National Fraternity Council or National Executive Council meeting unless a quorum is present. A quorum is defined as the presence of more than half of the number of those having the right to vote [cf. *General Constitutions*, article #77.4].
2. A majority, sometimes designated an *absolute* majority, is more than half of the total number of votes cast. A *relative* or *simple* majority is the highest number of votes cast on a motion or in an election [cf. *Code of Canon Law*, canon #119].
3. Where questions arise concerning procedures that are not covered by the *Code of Canon Law*, the *General Constitutions* or the *National Statutes*, reference may be made to *Robert's Rules of Order*. The President of the Elective Chapter (i.e., the Secular Franciscan who presides), after taking advice, retains the authority to determine any matter of procedure.

#### Article 10. Elections

1. Elections shall take place according to the norms of article #76.1 of the *General Constitutions*, the *National Statutes*, and the *International Statutes*.
2. The National Fraternity Council elects the Secular members of the National Executive Council.
3. The International Councilor is elected by the National Fraternity Council and represents NAFRA as a member of the International Council of the Secular Franciscan Order (hereafter CIOFS) in accordance with its *Statutes*.
4. The National Fraternity Council also elects a substitute delegate for the International Councilor from among the elected members of the National Executive Council should he or she be prevented from attending the CIOFS General Chapter [cf. article #5.2 of *CIOFS Statutes*]. In the event of such impediment, the National Minister shall inform the CIOFS Presidency of it and of the substitute delegation [cf. *CIOFS Statutes*, article #8.1].
5. The convocation and nominations for the office of International Councilor shall be carried out as in article #11 of these *National Statutes*.
6. In tallying votes which are conducted by secret written ballot, each elector shall submit one vote. Then all ballots, including blanks, shall be counted to assure the validity of the vote [cf. *Code of Canon Law*, canon #173.2].

## Article 11. Convocation and Nominations

1. At least four months prior to elections, the National Executive Council shall appoint a Chair for a Nominations Committee which will, acting according to norms established by the National Executive Council, present a slate of nominees for the offices to the members of the National Fraternity Council. This presentation shall be made approximately two months prior to the date set for the elections.
2. To be eligible as a candidate for election to office in the National Fraternity, one must be a permanently professed active member of the SFO [cf. *General Constitutions*, article #30]. Candidates should be convinced of the validity of the Franciscan evangelical way of life, attentive to a broad and encompassing vision of the life of the Church and of society, open to dialogue and ready to give and receive help and collaboration [cf. *General Constitutions*, article #31.3].
3. It shall be the duty of the Nominations Committee to ensure that each candidate meets the qualifications for the office for which she or he is proposed, has reviewed the duties of that office, and is willing to serve if elected.
4. Any individual elected to a national office may not hold an elected office at the Regional Fraternity level or the Local Fraternity level. (See Article 28.)
5. The provisions of article #76 of the *General Constitutions* shall be followed for convocation of the National Fraternity Council meeting for the purpose of elections.
6. Notification of CIOFS
  - a. The National Minister shall in timely fashion contact the General Minister of the SFO, requesting that she or he or a delegate preside over forthcoming National Fraternity elections.
  - b. The National Minister shall in timely fashion contact the President of the Conference of General Spiritual Assistants, requesting that he or a delegate attend forthcoming National Fraternity elections as the ecclesial witness.

## Article 12. Right to Vote at Elections

The right to vote in elective chapters has been defined in article #8 of these *National Statutes*.

### Article 13. Terms of Office

In addition to the provisions enumerated in article #79 of the *General Constitutions*, the following apply:

1. Length of Terms
  - a. The Secular members of the National Executive Council are elected for a term of three years.
  - b. The term of the International Councilor is governed by the provisions of article #5.4 of the *International Statutes*.
  - c. The term of the President of the Conference of National Spiritual Assistants is determined by the members of that Conference.
2. For a third and final successive election to the office of National Councilor (which includes every elected office except those of National Minister and National Vice Minister) or International Councilor, a majority of two-thirds (2/3) of the votes of those present, which must be obtained on the first ballot, will be necessary.
3. The outgoing National Minister cannot be elected to any other office on the National Executive Council. (See Article 28.)

### Article 14. Procedure in Voting

1. The vote shall be taken and completed as to each office before proceeding to the next, commencing with the office of National Minister. Persons not elected to the first office voted upon may be nominated for remaining offices.
2. Further nominations shall be received or at least solicited from the floor at the elective chapter.
3. The election procedure shall follow the provisions of articles #76 and #78 of the *General Constitutions*.
4. The election of National Councilors proceeds in the same manner as provided for in article #78.1 of the *General Constitutions*.

### Article 15. Provisions for Vacancies, Resignations, and Removals

1. The provisions of articles #81.1, #81.2 and #83 of the *General Constitutions* shall govern the procedure to be followed in the event the National Minister

or National Vice Minister resigns or is impeded from performing the duties of the office.

2. When the office of National Councilor becomes vacant, the Executive Council will proceed to appoint someone to substitute for him or her until the end of the term for which the Councilor was originally elected. If the appointee is already an elected member of the Council, he or she retains the right to vote. If the appointee is not an elected member, he or she serves without a vote.
3. The provisions of article #84 of the *General Constitutions* shall govern the procedure to be followed to secure the removal for cause of the National Minister or members of the National Fraternity Council.
4. The provisions of article #84.4 of the *General Constitutions* shall govern the appeals process for any officer removed from office.

## **Section III**

### **Fraternal Life**

#### **Article 16. Fraternity Life**

1. The provisions of articles #2, #3 and #4 of the *General Constitutions* concerning the nature of the vocation to the SFO apply.
2. The fraternal life, with its vitality and sustaining force, is meant to exist on the national level as well as on regional and local levels. For this reason, the National Fraternity is so constituted by leadership and structure, vitalized by the participation of its members, and nurtured by ongoing formation and spiritual assistance as to achieve its objective of being a real fraternity; and the same is true for each Regional and Local Fraternity.
3. The Fraternities should bear in mind that they are subject to the vigilance of the local Ordinary insofar as they perform their apostolic activities within the local churches. Secular Franciscans should, therefore, dialogue with their local Ordinaries and follow their directions, inasmuch as they are the moderators of the ministry of the Word and of the Liturgy and the coordinators of the various forms of apostolate in the local Diocesan church [cf. *Rule*, article #6].
4. The external sign of the SFO in the United States is the TAU.



## Article 17. Fraternal and Pastoral Visitations

The provisions of articles #92 through #95 of the *General Constitutions* and article#14 of the *Statutes for Spiritual Assistance* concerning the fraternal and pastoral visitations apply.

## Article 18. Local Fraternity

1. The Local Fraternity is the primary constituent part of the entire structure of Secular Franciscan life to which the member relates [cf. *Rule*, article #22].
2. The provisions of articles #46 and #47 of the *General Constitutions* shall govern the canonical establishment of new fraternities and determine the Franciscan friar province which assumes pastoral care [cf. *Statutes for Spiritual Assistance*, articles #6.1 and #11.2].
3. The Council of each Local Fraternity is composed according to the requirements of article #49.1 of the *General Constitutions*. With respect to the fraternity they assist, anyone who serves as a Spiritual Assistant is subject to the same rights and restrictions as are Franciscan religious Spiritual Assistants [cf. articles #12, #13, #15, #23 and #24, *Statutes for Spiritual Assistance*]. Spiritual Assistants who are Secular Franciscans may not be elected to other positions on the Councils of fraternities they assist.
4. A Local Fraternity may pass to the pastoral care of another friar province of the First Order or Third Order Regular in one of two ways [cf. *General Constitutions*, article #47.2; *Statutes for Spiritual Assistance*, article #6.2]:
  - a. The Council and Minister of the Local Fraternity approach the Regional Executive Council, including the Regional Spiritual Assistant(s), with the request for transfer. If the Regional Executive Council, including the Regional Spiritual Assistant(s), approves the request, the Regional Spiritual Assistant asks the Provincial Ministers or Provincial Spiritual Assistants of the two friar provinces to effect the transfer.
  - b. For the sake of providing better pastoral care, the Provincial Ministers or Provincial Spiritual Assistants of two friar provinces may initiate the transfer of a Local Fraternity from the care of one province to that of the other. The Provincial Ministers or Provincial Spiritual Assistants act in consultation with the Councils, including the Spiritual Assistants, of the Local and Regional Fraternities.

5. Establishment of sections or cells
  - a. Should one or more groups desire to establish permanent sections within a Local Fraternity based on particular needs or common interests, they may do so subject to the direction of the Local Fraternity Council [cf. *General Constitutions*, article #50.2.d], so long as they continue to participate fully in the Local Fraternity's fraternal and apostolic life. The Regional Fraternity will receive notice of the formation of such groups.
  - b. Such sections remain subject to the Local Fraternity as constituent parts of it [cf. *General Constitutions*, article #34].
6. No official business may be transacted at a Local Fraternity meeting unless a quorum is present. The quorum consists of a majority of active members who are not excused from attendance.
7. The Local Fraternity is responsible for contributing to the Regional Fraternity on a fair share basis from its common fund to underwrite the costs of that fraternity [cf. *General Constitutions*, article #30.3]. A fair share contribution is made based on the number of active and excused brothers and sisters, but not for those who are deemed lapsed.
  - a. An active fraternity member is one who participates both by attending fraternity meetings and by providing financial support to the community, or whom the fraternity has excused from such obligations.
  - b. Those brothers and sisters who neither attend meetings, support the community financially, nor have valid reasons due to health, family, work or distance, and who, after personal invitations to return to fraternity, consciously and deliberately reject or ignore the invitation, will be termed "lapsed" and will not be carried on the fraternity membership roll nor be reported as a member to higher fraternity Councils [cf. *General Constitutions*, article #53.3].
8. The Local Fraternity will present to the Regional Minister or his or her delegate and to the Regional Spiritual Assistant or the representative of the Conference of Regional Spiritual Assistants a stipend appropriate to the journey made and the length of stay required at the time of fraternal and pastoral visits, and also on the occasion of their presiding over and witnessing elections.
9. It is at the local level that activities have their greatest meaning to members of the SFO. The Local Fraternity Council should expend great care to provide for thought-provoking activities and programs to foster Franciscan life and to deepen Franciscan spirituality among fraternity members.

10. As fraternity members become unable to attend meetings on a regular basis, the Local Fraternity Council should set up a method by which regular contacts are maintained [cf. *General Constitutions*, #53.3].
11. The provisions relating to property control which appear in these *National Statutes* in the section dealing with the responsibilities of the National Fraternity shall apply to the Local Fraternities insofar as they may be adapted to the needs and circumstances of the Local Fraternity.
12. As required by article #54.2 of the *General Constitutions*, the National Executive Council shall approve statements for use by the Local Fraternities that establish “precise criteria” for their “statement of purposes” and “internal controls” which must be used in their establishing documents.
13. Affiliation with a local fraternity
  - a. Those who, without belonging to the SFO, wish to participate in its life and activities (see GC Art. 53.5 and 103.1) according to Franciscan principles and teachings, may be welcomed by the local fraternity, so as to make their communion living and effective. Individuals wishing to become affiliates should make their desire known by a written request to the local fraternity council, which makes a decision regarding the request.
  - b. These affiliate brothers and sisters will have no juridical bond with the Secular Franciscan Order and are, therefore persons welcomed to love and be loved “as a gift of the Lord and an image of Christ” (SFO Rule Art. 13). They may share the experiences and activities of the fraternity, without the right to vote.
  - c. In order that the identity of the fraternity not be altered, the number of affiliates may not exceed 40% of the number of active professed members of a fraternity.
  - d. Regional councils have the right to establish their own guidelines for the acceptance of affiliates.

## Article 19. Formation

1. Orientation
  - a. Orientation is a time for determining a person’s interest, eligibility and disposition to enter into the initial formation process [cf. *Guidelines for Initial Formation in the Secular Franciscan Order in the United States* (hereafter *Guidelines for Initial Formation*), page 25].

- b. The period of orientation shall consist of not less than three (3) months.

## 2. Initial Formation

- a. Inquiry – The period of Inquiry, which begins with the Ceremony of Introduction and Welcoming [cf. *Ritual*, page 9], shall consist of not less than six (6) months.
- b. Candidacy – The period of Candidacy, which begins with the Rite of Admission [cf. *Ritual*, page 11], shall consist of not less than eighteen (18) months and not more than thirty-six (36) months.
- c. All persons in initial formation, in addition to attending their formation sessions, must participate in the meetings of the Local Fraternity as this is an indispensable presupposition for initiation into community prayer and into fraternity life [cf. *General Constitutions*, article #40.3].
- d. To be admitted to the SFO in the United States, a person must be a fully initiated member of the Catholic Church (i.e., having received the Sacraments of Baptism, Chrismation/Confirmation and Holy Eucharist) in addition to being an actively practicing Catholic.

## 3. Profession

- a. The minimum age for perpetual profession as a Secular Franciscan in the United States is twenty-one (21) years.
- b. The minimum age for temporary profession as a Secular Franciscan in the United States is eighteen (18) years.

## 4. Ongoing Formation

Ongoing formation is the responsibility of all professed members consonant with article #44 of the *General Constitutions*.

## 5. Form and Methodology

- a. The form (i.e., content and process; cf. *General Constitutions*, #38.2) to be employed in both initial and ongoing formation is that found in the *Guidelines for Initial Formation*.
- b. The methodology employed in formation should be both interactive and experiential in nature [cf. *General Constitutions*, #40.4].

- c. Opportunities for fraternities to meet together for the purposes of common ongoing and initial formation shall occur whenever possible at all levels of fraternity [cf. *General Constitutions*, #40.1].

#### 6. Provisions for Remote Initial Formation

In those rare instances in which a person is legitimately impeded from participating in the normal formation process of a Local Fraternity, recourse may be had to the *Guidelines for Remote Initial Formation in the United States* as adopted by the National Executive Council in June 2000.

### Article 20. Transfer, Withdrawal, Suspension and Dismissal from the Fraternity and from the Order

The provisions set forth in articles #55 through #59 of the *General Constitutions* shall constitute the manner and means for transfer, withdrawal, suspension and dismissal from the fraternity and from the Order.

### Article 21. Regional Fraternity

1. The Regional Fraternities are constituted according to the provisions of the *General Constitutions*, article #61.
2. The governing body of each Regional Fraternity is the Regional Fraternity Council. The Regional Executive Council acts on behalf of the Regional Fraternity Council when the members of the entire Council are not in session [cf. *General Constitutions*, article #66.1].
3. The Regional Spiritual Assistant or the Conference of Regional Spiritual Assistants exercises pastoral care and spiritual guidance in regard to each Regional Fraternity as an integral component part of NAFRA and of the SFO, by the same means and manner as does the Conference of National Spiritual Assistants in regard to NAFRA [cf. *Statutes for Spiritual Assistance*, articles #21 and #22].

### Article 22. Regional Fraternity Council

1. The Regional Fraternity Council is composed of the Ministers of the Local Fraternities that together form the Regional Fraternity, the Regional Executive Council, and the Regional Spiritual Assistant or the Conference of Regional Spiritual Assistants, each of whom may vote. Regional Spiritual Assistants, however, do not vote in financial matters and in elective chapters [cf. *Statutes for Spiritual Assistance*, article #12.1].
2. The Regional Fraternity Council is the representative body of all of the Local Fraternities that together compose the Regional Fraternity, and has the power to create regional guidelines in conformity with the *Rule*, the *General Constitutions* and the *National Statutes*.

3. The Regional Fraternity Council shall meet at least once a year. Every third year the Regional Fraternity Council shall meet in elective chapter in accord with the *General Constitutions* and these *National Statutes*.
4. The Regional Fraternity Council has the duties set forth in article #62 of the *General Constitutions*.

#### Article 23. Regional Executive Council

1. Between the meetings of the Regional Fraternity Council, an elected Regional Executive Council shall carry on the business and carry out the purposes of the Regional Fraternity in a spirit of ministry and service [cf. *General Constitutions*, article #62.1].
2. The Regional Executive Council is composed of the Regional Minister, the Regional Vice Minister, the Regional Secretary, the Regional Treasurer, at least one elected Councilor, and the Regional Spiritual Assistant or the President of the Conference of Regional Spiritual Assistants. In addition, the Regional Formation Director may also be elected. In those regions in which the Regional Formation Director is appointed rather than elected, she or he attends the meetings of the Regional Executive Council and exercises a consultative role.
3. All elected members of the Regional Executive Council and the Spiritual Assistant have voting rights.
4. Election of the Secular members of the Regional Executive Council shall follow the model set forth in **Section II** of these *National Statutes* which deals with the National Fraternity insofar as it may be adapted to the needs and circumstances of the Regional Fraternity.
5. The Regional Executive Council may establish and direct commissions and committees deemed necessary to achieve the goals and objectives determined by the Regional Fraternity Council.
6. When not in session, the Regional Executive Council may conduct business electronically (i.e., via e-mail, telephone, fax, etc.), provided that any decisions and determinations made in this way are reviewed and ratified at the next regular meeting of the Council.
7. The Regional Executive Council shall meet at least twice a year, at times and places to be determined by its members. The Regional Minister shall give written notice of meetings at least two months in advance.

Article 24. Duties of Officers of the Regional Executive Council

1. The Regional Minister has the duties set forth in article #63 of the *General Constitutions*.
2. The duties of the Regional Vice Minister, Secretary, and Treasurer shall follow the model set forth in that portion of these *National Statutes* which deals with the National Fraternity insofar as it may be adapted to the needs and circumstances of the Regional Fraternity.
3. Each Regional Fraternity shall follow the model set forth in that portion of these *National Statutes* which deals with the National Fraternity in connection with policies and procedures to be followed in the event of resignation or removal from office on the part of any elected Officer.

Article 25. Structure for Property Control for the Regional Fraternity

1. The provisions relating to property control which appear in these *National Statutes* in the section dealing with the responsibilities of the National Fraternity shall apply to the Regional Fraternities insofar as they may be adapted to the needs and circumstances of the Regional Fraternity.
2. Particular note should be taken that expenses of the Regional Executive Council and those individuals invited by this Council to serve the Regional Fraternity in some capacity shall be borne by the Regional Fraternity for attendance at required meetings.
3. The Regional Fraternity is responsible for contributing to the National Fraternity on a fair share basis from its treasury to help provide for the expenses of NAFRA.
4. As required by article #54.2 of the *General Constitutions*, the National Executive Council shall approve statements for use by the Regional Fraternities that establish “precise criteria” for their “statement of purposes” and “internal controls” which must be used in their establishing documents.

Article 26. Fraternal and Pastoral Visits to the Regional Fraternity

1. The provisions of article #92 through article #95 of the *General Constitutions* concerning the fraternal and pastoral visitations apply as does article #14 of the *Statutes for Spiritual Assistance*.
2. The Regional Fraternity will present to the National Minister or his or her delegate and the representative of the Conference of National Spiritual

Assistants a stipend appropriate to the journey made and the length of stay required at the time of fraternal and pastoral visits, and also on the occasion of their presiding over and witnessing elections.

#### Article 27. Franciscan Youth and Young Adults

The provisions of articles #96 and #97 of the *General Constitutions* concerning Franciscan Youth and Young Adults apply.

#### Article 28. Applicability of These *Statutes* to All Levels of Fraternity

The various provisions set forth in these *National Statutes* for NAFRA administration shall be used as a model for elections, conduct of business, structures for control of property, composition and duties of the Fraternity Minister and of the Fraternity Council, replacement of officers who are unable to continue in office, and similar business of the fraternity at any level. However, Articles 11.4 and 13.3 do not apply to regional and local fraternities. A member of a regional council may also be a member of a local fraternity council.

#### Article 29. Amendments

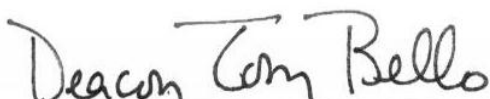
1. These *National Statutes* may be amended by two-thirds vote of the National Fraternity Council provided that a copy of the proposed amendment is distributed to the National Fraternity Council at least 60 days before the vote on said amendment is to be taken.
2. All such amendments are subject to the approval of the Presidency of CIOFS.

**ATTESTED AS APPROVED ON OCTOBER 18, 2002 BY THE NATIONAL FRATERNITY COUNCIL, SFO-USA.**

**APPROVED AND RATIFIED BY THE INTERNATIONAL PRESIDENCY, JULY 4, 2003.**

**ATTESTED AS AMENDED ON OCTOBER 30, 2010 BY THE NATIONAL FRATERNITY COUNCIL, SFO-USA.**

**CONFIRMED BY THE INTERNATIONAL PRESIDENCY, JULY 24, 2013.**

  
Tom Bello, SFO - National Minister

  
Jan Parker, SFO – National Secretary



**Appendix A**  
**National Statutes Article 3.7.a: Composition of the Regional Fraternities**

- #      Name of Region, followed by short geographic description:
- 50      'Ohana 'O Ke Anuenue : HI.
- 51      Five Franciscan Martyrs : FL, plus up to about 31 degrees n latitude to include South GA, Lower AL around the Mobile Bay area.
- 52      St. Francis : s CA up to San Luis Obispo area.
- 53      Blessed Junipero Serra : n CA from Bakersfield n; most of NV except Las Vegas area.
- 54      Troubadours of Peace : OR, WA, ID, AK.
- 55      Queen of Peace : ND, MN, IA, most of SD except sw area around Rapid City, e 2/3 NE, w 1/4 WI.
- 56      Divine Mercy : Lower MI, plus Lucas County OH (Toledo OH area).
- 57      Saint Margaret of Cortona : VA, DC, all of MD except far w around Cumberland, s central PA around the Harrisburg/Lancaster/York area, far e WV around Martinsburg/Charles Town area.
- 58      St. Thomas More : AZ, s part NV around Las Vegas.
- 59      Mother Cabrini : ne IL including all of metro Chicago, w to Rockford and s to Kankakee.
- 60      St. Joan of Arc : LA, MS, far e TX from Houston e, s 2/3 AR from Little Rock s, far sw TN around Memphis.
- 61      Brothers and Sisters of St Francis : NC, SC, n 90% GA, AL except lower part around the Mobile Bay area, TN except far sw area around Memphis.
- 62      Exaltation of the Holy Cross : N/A.
- 63      Franciscans of the Prairie : n 3/4 IL, excluding East St Louis/Bellville area and s, excluding also ne area from Rockford to Kankakee.
- 64      Holy Trinity Region : KY, s half OH including the counties of the Diocese of Columbus (except Tuscarawas County) and part of the Diocese of Steubenville; se IN near Louisville KY.
- 65      La Verna : e 3/4 WI, Upper MI.
- 66      Our Lady of Indiana : n 3/4 IN, excluding areas around Evansville and Louisville KY.
- 67      Los Tres Compañeros/the Three Companions : central TX from OK border s to Mexico and Gulf of Mexico, w to San Angelo and Abilene, and e to (but not including) Houston.
- 68      Lady Poverty : WV except far e WV around Martinsburg/Charles Town area, w half PA except Erie, far w MD around Cumberland, far e part OH around Steubenville.
- 69      St Katharine Drexel : DE, e half PA except s central area around Harrisburg/Lancaster/York, s half NJ from Trenton s.
- 70      Maximillian Kolbe : n 1/2 OH including all of the counties in the Diocese of Cleveland, the Diocese of Youngstown, and the counties of the Diocese of Toledo, except Lucas County (Toledo area), and only the county of Tuscarawas in the Diocese of Columbus.
- 71      BI Kateri Tekakwitha : upstate NY plus Erie PA, excluding NY counties adjacent to borders with NJ, CT, and far e PA, also excluding far ne NY around Plattsburgh, Saranac Lake and Long Lake.
- 72      Santa Maria de las Montañas : CO, UT, WY except far n area around Sheridan, sw area SD around Rapid City, w 1/3 NE to include Stratton, nw corner KS to include Atwood.
- 73      Our Lady of the Rockies : MT; far n WY around Sheridan.
- 74      St Clare : s 80% MO, n 1/3 AR excluding Little Rock and s, s 1/4 IL from East St Louis/Bellville s, far sw corner IN around Evansville.
- 75      Our Lady of Guadalupe : NM, far w TX excluding Abilene and San Angelo and e, far e AZ in Navajo reservation area around St Michaels.

- 76 Solanus Casey : CT, RI, w 1/3 MA from Holyoke/Springfield and w, s MA around Fall River /New Bedford, and part of Cape Cod, NY counties adjacent to borders with NJ, CT and far e PA except part of s Westchester County which is shared.
- 77 Our Lady of the Angels : n half NJ excluding Trenton and s; NY counties of Staten Island and Manhattan (New York County), plus part of s Westchester county.
- 78 St Elizabeth of Hungary : VT, NH, ME, e 2/3 MA excluding Holyoke/Springfield and w, also excluding s MA around Fall River /New Bedford, plus part of Cape Cod, far ne NY around Plattsburgh, Saranac Lake and Long Lake.
- 79 Tau Cross : NY counties on Long Island, plus Bronx.
- 80 Juan de Padilla : KS except nw corner around Atwood, OK, plus area around Kansas City MO.

## *The Rule of the Secular Franciscan Order*

### **Prologue: Exhortation of St. Francis to the Brothers and Sisters of Penance (circa 1210-1215)**

#### Chapter 1: Concerning Those Who Do Penance

All who love the Lord with their whole heart, with their whole soul and mind, with all their strength, and love their neighbors as themselves and hate their bodies with their vices and sins, and receive the Body and Blood of our Lord Jesus Christ, and produce worthy fruits of penance.

Oh, how happy and blessed are these men and women when they do these things and persevere in doing them, because "the spirit of the Lord will rest upon them" and he will make "his home and dwelling among them", and they are the sons of the heavenly Father, whose works they do, and they are the spouses, brothers, and mothers of our Lord Jesus Christ.

We are spouses, when by the Holy Spirit the faithful soul is united with our Lord Jesus Christ, we are brothers to him when we fulfill "the will of the Father who is in heaven".

We are mothers, when we carry him in our heart and body through divine love and a pure and sincere conscience; we give birth to him through a holy life which must give light to others by example.

Oh, how glorious it is to have a great and holy Father in heaven! Oh how glorious it is to have such a beautiful and admirable Spouse, the Holy Paraclete.

Oh, how glorious it is to have such a Brother and such a Son, loved, beloved, humble, peaceful, sweet, lovable, and desirable above all: Our Lord Jesus Christ, who gave up his life for his sheep and prayed to the Father saying:

"Oh holy Father, protect them with your name whom you gave me out of the world. I entrusted to them the message you entrusted to me and they received it. They have known that in truth I came from you, they have believed that it was you who sent me. For these I pray, not for the world. Bless and consecrate them, and I consecrate myself for their sakes. I do not pray for them alone; I pray also for those who will believe in me through their word that they may be holy by being one as we are. And I desire, Father, to have them in my company where I am to see this glory of mine in your kingdom."

#### Chapter 2: Concerning Those Who Do Not Do Penance

But all those men and women who are not doing penance and do not receive the Body and Blood of our Lord Jesus Christ and live in vices and sin and yield to evil concupiscence and to the wicked desires of the flesh, and do not observe what they have promised to the Lord, and are slaves to the world, in their bodies, by carnal desires and the anxieties and cares of this life.

These are blind, because they do not see the true light, our Lord Jesus Christ; they do not have spiritual wisdom because they do not have the Son of God who is the true wisdom of the Father. Concerning them, it is said, "Their skill was swallowed up" and "cursed are those who turn away from your commands". They see and acknowledge, they know and do bad things and knowingly destroy their own souls.

See, you who are blind, deceived by your enemies, the world, the flesh and the devil, for it is pleasant to the body to commit sin and it is bitter to make it serve God because all vices and sins come out and "proceed from the heart of man" as the Lord says in the Gospel. And you have nothing in this world and in the next, and you thought you would possess the vanities of this world for a long time.

But you have been deceived, for the day and the hour will come to which you give no thought and which you do not know and of which you are ignorant. The body grows infirm, death approaches, and so it dies a bitter death, and no matter where or when or how man dies, in the guilt of sin, without penance or satisfaction, though he can make satisfaction but does not do it.

The devil snatches the soul from his body with such anguish and tribulation that no one can know it except he who endures it, and all the talents and power and "knowledge and wisdom" which they thought they had will be taken away from them, and they leave their goods to relatives and friends who take and divide them and say afterwards, "Cursed be his soul because he could have given us more, he could have acquired more than he did." The worms eat up the body and so they have lost body and soul during this short earthly life and will go into the inferno where they will suffer torture without end.

All those into whose hands this letter shall have come we ask in the charity that is God to accept kindly and with divine love the fragrant words of our Lord Jesus Christ quoted above. And let those who do not know how to read have them read to them.

And may they keep them in their mind and carry them out, in a holy manner to the end, because they are "spirit and life".

And those who will not do this will have to render "an account on the day of judgement" before the tribunal of our Lord Jesus Christ.

### **Chapter 1: The Secular Franciscan Order**

1. The Franciscan family, as one among many spiritual families raised up by the Holy Spirit in the Church, unites all members of the people of God -- laity, religious, and priests-- who recognize that they are called to follow Christ in the footsteps of St. Francis of Assisi. In various ways and forms but in life-giving union with each other, they intend to make present the charism of their common Seraphic Father in the life and mission of the Church.
2. The Secular Franciscan Order holds a special place in this family circle. It is an organic union of all Catholic fraternities scattered throughout the world and open to every group of the faithful. In these fraternities the brothers and sisters, led by the Spirit, strive for perfect charity in their own secular state. By their profession they pledge themselves to live the gospel in the manner of St. Francis by means of this rule approved by the Church.
3. The present rule, succeeding "Memoriale Propositi" (1221) and the rules approved by the Supreme Pontiffs Nicholas IV and Leo XIII, adapts the Secular Franciscan Order to the needs and expectations of the Holy Church in the conditions of changing times. Its interpretation belongs to the Holy See and its application will be made by the General Constitutions and particular statutes.

### **Chapter 2: The Way of Life**

4. The rule and life of the Secular Franciscans is this: to observe the gospel of our Lord Jesus Christ by following the example of Saint Francis of Assisi, who made Christ the inspiration and the center of his life with God and people. Christ, the gift of the Father's love, is the way to him, the truth into which the Holy Spirit leads us, and the life which he has come to give abundantly.

Secular Franciscans should devote themselves especially to careful reading of the gospel, going from gospel to life and life to the gospel.

5. Secular Franciscans, therefore, should seek to encounter the living and active person of Christ in their brothers and sisters, in Sacred Scripture, in the Church, and in liturgical activity. The faith of

Saint Francis, who often said "I see nothing bodily of the Most High Son of God in this world except his most holy body and blood," should be the inspiration and pattern of their Eucharistic life.

6. They have been made living members of the Church by being buried and raised with Christ in baptism; they have been united more intimately with the Church by profession. Therefore, they should go forth as witnesses and instruments of her mission among all people, proclaiming Christ by their life and words.

Called like Saint Francis to rebuild the Church and inspired by his example, let them devote themselves energetically to living in full communion with the pope, bishops, and priests, fostering an open and trusting dialogue of apostolic effectiveness and creativity.

7. United by their vocation as "brothers and sisters of penance," and motivated by the dynamic power of the gospel, let them conform their thoughts and deeds to those of Christ by means of that radical interior change which the gospel itself calls "conversion." Human frailty makes it necessary that this conversion be carried out daily.

On this road to renewal the sacrament of reconciliation is the privileged sign of the Father's mercy and the source of grace.

8. As Jesus was the true worshipper of the Father, so let prayer and contemplation be the soul of all they are and do.

Let them participate in the sacramental life of the Church, above all the Eucharist. Let them join in liturgical prayer in one of the forms proposed by the Church, reliving the mysteries of the life of Christ.

9. The Virgin Mary, humble servant of the Lord, was open to his every word and call. She was embraced by Francis with indescribable love and declared the protectress and advocate of his family. The Secular Franciscans should express their ardent love for her by imitating her complete self-giving and by praying earnestly and confidently.

10. United themselves to the redemptive obedience of Jesus, who placed his will into the Father's hands, let them faithfully fulfill the duties proper to their various circumstances of life. Let them also follow the poor and crucified Christ, witness to him even in difficulties and persecutions.

11. Trusting in the Father, Christ chose for himself and his mother a poor and humble life, even though he valued created things attentively and lovingly. Let the Secular Franciscans seek a proper spirit of detachment from temporal goods by simplifying their own material needs. Let them be mindful that according to the gospel they are stewards of the goods received for the benefit of God's children.

Thus, in the spirit of "the Beatitudes," and as pilgrims and strangers on their way to the home of the Father, they should strive to purify their hearts from every tendency and yearning for possession and power.

12. Witnessing to the good yet to come and obliged to acquire purity of heart because of the vocation they have embraced, they should set themselves free to love God and their brothers and sisters.

13. As the Father sees in every person the features of his Son, the firstborn of many brothers and sisters, so the Secular Franciscans with a gentle and courteous spirit accept all people as a gift of the Lord and an image of Christ.

A sense of community will make them joyful and ready to place themselves on an equal basis with all people, especially with the lowly for whom they shall strive to create conditions of life worthy of people redeemed by Christ.

14. 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. Mindful that anyone "who follows Christ, the perfect man, becomes more of a man himself," let them exercise their responsibilities competently in Christian spirit of service.

15. Let them individually and collectively be in the forefront in promoting justice by the testimony of their human lives and their courageous initiatives. Especially in the field of public life, they should make definite choices in harmony with their faith.

16. Let them esteem work both as a gift and as a sharing in the creation, redemption, and service of the human community.

17. In their family they should cultivate the Franciscan spirit of peace, fidelity, and respect for life, striving to make of it a sign of a world already renewed in Christ.

By living the grace of matrimony, husbands and wives in particular should bear witness in the world to the love of Christ for his Church. They should joyfully accompany their children on their human and spiritual journey by providing a simple and open Christian education and being attentive to the vocation of each child.

18. Moreover, they should respect all creatures, animate and inanimate, which "bear the imprint of the Most High," and they should strive to move from the temptation of exploiting creation to the Franciscan concept of universal kinship.

19. Mindful that they are bearers of peace which must be built up unceasingly, they should seek out ways of unity and fraternal harmony through dialogue, trusting in the presence of the divine seed in everyone and in the transforming power of love and pardon.

Messengers of perfect joy in every circumstance, they should strive to bring joy and hope to others.

Since they are immersed in the resurrection of Christ, which gives true meaning to Sister Death, let them serenely tend toward the ultimate encounter with the Father.

### **Chapter 3: Life in Fraternity**

20. The Secular Franciscan Order is divided into fraternities of various levels--local, regional, national, and international. Each one has its own moral personality in the Church. These various fraternities are coordinated and united according to the norm of this rule and of the constitutions.

21. On various levels, each fraternity is animated and guided by a council and minister (or president) 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.

22. The local fraternity is to be established canonically. It becomes the basic unit of the whole Order and a visible sign of the Church, the community of love. This should be the privileged place

for developing a sense of Church and the Franciscan vocation and for enlivening the apostolic life of its members.

23. Requests for admission to the Secular Franciscan Order must be presented to the local fraternity, whose council decides upon the acceptance of new brothers and sisters.

Admission into the Order is gradually attained through a time of initiation, a period of formation of at least one year, and profession of the rule. The entire community is engaged in this process of growth by its own manner of living. The age for profession and the distinctive Franciscan sign are regulated by the statutes.

Profession by its nature is a permanent commitment.

Members who find themselves in particular difficulties should discuss their problems with the council in fraternal dialogue.

Withdrawal or permanent dismissal from the Order, if necessary, is an act of the fraternity council according to the norm of the constitutions.

24. To foster communion among members, the council should organize regular and frequent meetings of the community as well as meeting with other Franciscan groups, especially with youth groups. It should adopt appropriate means for growth in Franciscan and ecclesial life and encourage everyone to a life of fraternity. This communion continues with deceased brothers and sisters through prayer for them.

25. Regarding expenses necessary for the life of the fraternity and the needs of worship, of the apostolate, and of charity, all the brothers and sisters should offer a contribution according to their means. Local fraternities should contribute toward the expenses of the higher fraternity councils.

26. As a concrete sign of communion and co-responsibility, the councils on various levels, in keeping with the constitutions, shall ask for suitable and well-prepared religious for spiritual assistance. They should make this request to the superiors of the four religious Franciscan families, to whom the Secular Fraternity has been united for centuries.

To promote fidelity to the charism as well as observance of the rule and to receive greater support in the life of the fraternity, the minister or president, with the consent of the council, should take care to ask for a regular pastoral visit by the competent religious superiors as well as for a fraternal visit from those of the higher fraternities, according to the norm of the constitutions.

*Blessing of St. Francis (1226):*

May whoever observes all this be filled in heaven with the blessing of the most high Father, and on earth with that of his beloved Son, together with the Holy Spirit, the Comforter.