



*Secular Franciscan Order
St. Elizabeth of Hungary Region*

Council Handbook

March 2026

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WELCOME MINISTER AND COUNCIL MEMBERS

Peace and all good!

Thank you for your “yes”. You have been elected to humbly serve, lead, guide and animate your fraternity. May God give you strength and special blessings as you fulfill the role entrusted to your care. Remember that God gives you gifts and it is His desire that you are in this position of responsibility. You are not alone. We serve together as sisters and brothers together using the talents and treasures given to us by our almighty God.

As we go through formation, we are taught about St. Francis, St. Clare, Franciscan Spirituality, the Rule, and the organizational structure of our Order. Generally, we are taught very little about the duties and responsibilities of serving on a council. This handbook is a reference and guide for ministers and council members. The information contained herein will be beneficial to both seasoned and new council members. May God bless your ministry.

With a grateful heart.

Minister, St. Elizabeth of Hungary Region

VISION STATEMENT

Saint Elizabeth of Hungary Region

The Mission of Saint Elizabeth of Hungary Region of the Secular Franciscan order is to proclaim and witness to the Gospel of Our Lord Jesus Christ, inspired by the example of Saint Francis of Assisi, by promoting and supporting the local fraternities in the Northern New England area.

Together, through the lives of diverse Catholic men and women in local fraternities, we profess commitment to these ideals. Inspired by the Holy Spirit, we strive to humbly serve all people, especially the poor and forgotten.

We celebrate joyfully the gift of life in all creation and recognize God's living presence in the world.

REGIONAL AND NATIONAL CALENDAR 2026

Event	Date and Time
REC Zoom	Jan 12, 2026 at 7pm
REC Zoom	Feb 9, 2026 at 7pm
REC Zoom	Mar 9, 2026 at 7pm
REC In-Person	Apr 10, 2026 at Noon
Visitation Chapter 2026 (3 day)	Apr 10-12, 2026 (Franciscan Guest House, Kennebunk)
REC In-Person	Apr 10 at 1pm
Regional Retreat 2026	May 15-17, 2026 (Franciscan Guest House, Kennebunk)
District Days	
REC Zoom	Jun 8, 2026 at 7pm
Quinquennial Congress	Jul 29 – Aug 2, 2026 (Lexington, KY)
REC Zoom	Aug 10, 2026 at 7pm
REC Zoom	Sep 14, 2026 at 7pm
REC Zoom	Oct 12, 2026
National Chapter 2026	Oct 13-18, 2026 (Wichita, KS)
REC In-Person	Nov 13, 2026 at Noon
Formation Conference	Nov 13-14, 2026
Retreat 2027	April 23- 25, 2027 (Franciscan Guest House)
Election Chapter 2027	May 14-15, 2027 (Franciscan Guest House)
Secular Franciscan Pilgrimage to Assisi and Rome	Fall 2027 (September anticipated)
Formation Team	As scheduled
Formation Team Interactive Zoom with Fraternities	Jan 19, 2026 at 7pm, Mar 11 at 7pm
JPIC Team	4 th Monday at 8pm
Minister Zoom (Thursdays)	Jan 8, Mar 5, Sep 10, Nov 5
VM Zoom	Oct 29, 2025 at 7pm
Treasurer Zoom	Nov 18, 2025 at 7pm
Secretary Zoom	Oct 28, 2025 at 7pm

Updated: 3/9/26

Subject to Change

YOUR REGIONAL COUNCIL

Position	Member	Email
Minister	Dan Spofford	ofsmindan@gmail.com
Vice Minister	Mary Galpin	galpinmh@comcast.net
Secretary	Kathryn Swegart	kswegartofs@gmail.com
Treasurer	Gloria Hayes	forgetmenot@metrocast.net
Councilor Distr 1 (VT/NY)	Jane Hosmer	jhosmer52@charter.net
Councilor (Metro Boston)	Malvena Driscoll	msdriscoll13@yahoo.com
Councilor (NH)	Mark Koski	mjkoski@catholicexchange.com
Councilor (S+W of Boston)	Kevin Cushing	kevinpcushing65@gmail.com
Councilor (N+W of Boston)	Francine Gikow	gikow0-ofs@yahoo.com
Councilor (Maine)	Dean Astumian	astumian@maine.edu
Formation Director	Stephen Shields	sms.sfo@gmail.com
Ecumenical/ Interfaith Animator	Kevin Coy	thecoys1976@comcast.net
Franciscan Youth Animator	Pending Appointment	
JPIC Animator	Kay Spofford	kay.spoffordofs@gmail.com
Newsletter Editor	Miriam Kennedy	mekofs@gmail.com
Regional Webmaster	Mark Koski	mjkoski@catholicexchange.com
RSA: Our Lady of Guadalupe OFM	Fr Cid Joseph OFM	cjoseph@friars.us
RSA: St Casimir OFM	Br Algirdas Malakauskis OFM	brolisalgis@hotmail.com
PSA: St Mary's OFM Cap	Fr Sam Fuller OFM Cap	sfullerofmcap@gmail.com

MINISTER and /COUNCIL JOB DESCRIPTIONS

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. (*GC Art.30.1*)

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. (*GC Art. 30.2*)

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. (*GC Art. 31.2*)

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. (*GC Art. 31.3*)

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. (*GC Art. 32.1*)

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 office. (*GC Art. 32.2*)

MINISTER JOB DESCRIPTION

The duties of a minister are clearly defined in our General Constitutions, Article 51.2.

These duties require the minister to:

- Prepare the annual report to regional (the request and format come from the Regional Minister at the end of a calendar year and the report must be forwarded to the Regional Minister by the date requested (February 1).
- The Minister requests the involvement of the Region to preside over the fraternity's Election, Fraternal Visitation, and Pastoral Visitation. These requests should be in writing using the "Election and Visitation Request Form" and be sent to the Regional Minister by December 31 of the prior year.
- The Minister provides the fraternity with updates on decisions made by the council.
- The Minister updates the fraternity with information from the Regional Minister.
- The Minister takes the lead in addressing any issues within the fraternity before they become detrimental to health of the fraternity. This might involve a personal conversation with an individual (with a second member of the council present for the discussion). If the issue is common to a number of members of the fraternity, the Minister will discuss openly at a fraternity meeting.
- The Minister should have a meeting, once a year, to get input from the fraternity on what is going well within the fraternity, what needs to change moving forward, and general discussion about the fraternity. Some fraternities call this a Town Hall Meeting.
- A Minister must truly be a servant leader!

The Local Fraternity Minister is Responsible for the Following:

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. (General Constitutions Art. 51.1)

- Open and close fraternity and council gatherings with prayer from the Ritual.
- Convoke and preside at meetings of the local fraternity council.
- If the local Fraternity Minister is unable to be present at a fraternity Council meeting, the meeting may be held with the Vice Minister conducting the business (*General Constitutions*). Business should be accomplished each and every month so as not to hinder the life and growth of the fraternity.
- Celebrate the ceremonies of Introduction and Welcoming
- Celebrate the Rite of Admission
- Celebrate the Rite of Profession or Permanent Commitment to the Gospel Life with the MASS. *This is a solemn occasion – please practice.*
- To attend or send a fraternity representative (*VM or council member*) to the annual Chapter meeting (usually *April*). *A council member needs a letter of delegation from the Minister for the purpose of voting at least 1 month prior to the Chapter. This may be emailed by the Minister to the Regional Minister.*
- To convoke every three years the elective chapter of the local fraternity, with the consent of the local council. This must be coordinated with the Regional Council who must be in attendance for the elections to be valid. (*Please read Election*

Guidelines and References to review prior to an election in the GC and National Statutes).

- Request a pastoral and fraternal visitation with the consent of the council, from the St. Elizabeth Regional Minister (or delegate) using the Election and Visitation Request Form. Along with these visitations comes a financial responsibility to provide a stipend and pay for the mileage.
- Before the election occurs, your fraternity should conduct an audit of your treasury with a signed copy of the results kept with your financial records. This may be done by two non-council members or a outside professional. This will be reviewed at your Fraternal visitation.
- To attend or send fraternity representatives (and/or the entire fraternity) to district meetings, Transitus services, workshops, regional events such as the annual Retreat (generally May) and Formation Conference (generally November) gathering of the entire St. Elizabeth of Hungary Region. The registration forms are sent to the local minister and/or the formation director and it is his/her responsibility to see that this form is distributed to everyone so they are given the opportunity to register well before the designated deadline.
- Complete any forms and/or questionnaires sent to you by the Regional Executive Council and Minister in a timely fashion. If you need you may call a special gathering of your local council to complete the forms. Since it is acceptable to complete business electronically (*See National Statutes Article 5 #6*) you may gather the needed information before and after your monthly council meeting and return the forms as soon as possible.
- Develop an annual calendar with your Council which includes ongoing formation and special events.
- Coordinate good initial formation with the council and local fraternity formation director and/or formation team. This will entail knowing what initial formation

materials are recommended by the St. Elizabeth of Hungary Regional Formation Director/Team.

- To ensure well documented and confidential records are kept on the steps of formation of those in the initial formation program at the local fraternity level. This should be done in cooperation with the local formation director. If help is needed, contact St. Elizabeth of Hungary Regional Formation Director (*see Regional Directory*).
- To coordinate good ongoing formation with the council, and the local formation director/team. Records of items used for this ongoing formation should be kept and shared with your Regional Formation Director, who can also be asked to present ongoing formation as the need arises.
- Assure that the local Secretary takes minutes of the council meeting and fraternity gathering and that a copy is kept in the fraternity records. The whereabouts of these records should be told to the Regional Executive Council in the yearly annual report.
- Assure that the Treasurer has a report at each monthly council meeting and that it is included in the council meeting minutes. Share financial information with your fraternity regularly.
- Review your current roster of and send any updates to the Regional Secretary no later than November 1.
- Assure that your Annual Minister's Report is sent to the Regional Minister by February 1.
- Send completed Membership Status Change Forms on professions, deaths, transfers, lapsed, withdrawn members when it happens – on a regular basis to the Regional Secretary. Please don't save them up for the end of the year. Rites of

Admission and Professions we must have complete information (address and dates) to be able to place them in the database.

- Send your Fair Share assessment (from your Common Fund) and fraternity Annual Treasurer's Report to the Regional Treasurer by February 1. Annual Fair share is \$60 per professed member (active and active excused professed). This should be the first item that your fraternity pays before giving any monies to other charities.
- Develop a yearly budget for the fraternity in cooperation with the fraternity treasurer and council members. Remember, your spiritual assistant does not vote on money issues.
- Train your replacement.
- A minister of a local fraternity is to work collaboratively with all of the other councilors.

VICE MINISTER JOB DESCRIPTION

The duties of a vice minister are defined in our General Constitutions, Article 52.1.

These duties require the vice minister to:

- Be a resource to the minister. Helping implement decisions made at council.
- Perform duties as assigned by the Minister.
- To fill in when the minister is not available.
- To take over as minister, if the minister is not able to serve out their term.

SECRETARY JOB DESCRIPTION

The duties of a secretary are defined in our General Constitutions, Article 52.2.

Primary Secretary duties:

- Be the “keeper” of your fraternity’s files and history, minutes of the Council and Fraternity gatherings.
- Document all fraternity gathering and council meeting minutes (both open and closed/executive session).
- Document all discussions related to issues within the fraternity.
- Document discussions and decisions about individuals moving to the next step of initial formation are documented. For example, when a person is moving from inquiry to candidacy, this should be documented.
- If someone’s behavior within the fraternity is unacceptable, this must be noted in the minutes, and an action plan should be documented in the secretary’s minutes with milestones to be met and decisions to be made.
- Maintain a Register of Active Members including professions, deaths, and transfers (incoming and outgoing). Also, record when a member officially becomes Inactive or “lapsed,” and maintain another list of “Inactive or lapsed” members.
- Maintain addresses, phone numbers and emails for mailings and notices,
- Reports and dates of Pastoral and Fraternal Visitations as well as Elections
- A list of the succession of Officers for the Fraternity including terms of office and names.
- The Fraternity’s Document of Establishment (if available).
- Meeting Attendance Records
- Report all **Membership Changes** (using the Membership Status Change Form is available online at: www.stelizabethsfo.com. These changes may include dates of Acceptance into the Fraternity (Inquiry), Candidacy and Profession) to the Regional Secretary.
- **Transfers:** Please see the Regional Transfer Form and available online at: www.stelizabethsfo.com.
- **Address, phone number or email changes:** If someone changes their address, telephone numbers, or email, please send the Regional Secretary those changes on the Membership Change Form and also available online at www.stelizabethsfo.com.

- **Problems receiving the Herald or TAU-USA:** If someone is a candidate or professed and not receiving the TAU-USA, the regional secretary needs that person's current address to update records and trouble shoot. The regional secretary cannot find out why a person is not receiving the regional or national mailings without the current address. Please provide a Membership Status Change Form for the individual noting that they are not getting the Herald or Tau-USA.
- Please email a copy of your fraternity's newsletter or bulletin to the Regional Minister each month.
- Other tasks which lead to the smooth running of the fraternity.

Official documents such as the Establishment Document and the Fraternity Register should be kept in a fireproof file in a safe location. Electronic copies are also advised.

TREASURER JOB DESCRIPTION

The duties of a treasurer are defined in our General Constitutions, Article 52.4. These duties require the treasurer to:

- To make sure a financial audit is completed each year and in advance of an election.
- To prepare the Local Fraternity Budget for the next year and submit it to the local fraternity council for approval.
- To prepare and submit the fraternity's fair share and Annual Treasurer's Report with the next year's approved budget to the Regional Treasurer by February 1. The form is found on the Regional Website's resource page, <http://stelizabethofs.com/resources/treasurer-resources/>
- To update the fraternity and its council monthly on actuals versus budget for the previous month.
- To be available and ready, at all times, to answer all financial questions related to their local fraternity.
- In conjunction with the Ministers, arrange for an audit of the fraternity treasury prior to each election.

FORMATION DIRECTOR JOB DESCRIPTION

The duties of a Formation Director are defined in our General Constitutions, Article 52.3.

These duties require the formation director to:

- Have a formation plan for initial formation (based on the Region's syllabi)
- Have a formation plan for on-going formation (at least 6 months)
- Keep a folder for each person in formation with copies of their paperwork (baptism, confirmation, marriage, and annulment documents) and their attendance and work covered.
- Provide input to the council on an individual in formation's progress.

Reference: Formation Director's Manual <https://stelizabethofs.org/formation/>

DISTRICT COUNCILOR JOB DESCRIPTION

The St. Elizabeth of Hungry Regional Fraternity serves the local fraternities in a large geographical area, thus making it necessary to divide the region into districts.

District Councilors are elected to serve the fraternities in a particular district. Councilors should have a grasp of the Rule, the General Constitution, the Ritual, the National Statues, and the Regional Guidelines.

The District Councilor serves as a liaison between the Regional Executive Council and the local fraternities. This includes making regular reports to the Executive Council and reporting information and activities of the Regional Fraternity to the local fraternities by frequent contact (written, phone, email, informal visits) as appropriate.

Further, the Regional District Councilor calls the fraternities to come together in fraternal gatherings to foster the Franciscan charism of fraternity beyond their own local fraternity.

The Regional District Councilor is encouraged to do what is necessary to help build up the local fraternities, to be present to them with the purpose of helping the fraternity remain faithful to our Catholic tradition and our Franciscan spirituality and to comply with our OFS Rule article #22, "The local fraternity... (is the)... basic unit of the whole order... and the privileged place for developing a sense of Church and (our) Franciscan vocation... "

To help build up the local fraternity, the District Councilor also needs to be available:

- to facilitate the transition meeting between incoming and outgoing councils
- to encourage attendance at regional events
- to ensure local fraternities receive the important forms from the Regional Fraternity
- to bring the concerns of the local fraternity to the Regional Executive Council
- to stimulate communications from the local fraternity to the Regional Fraternity
- to preside at elections and fraternal visits when delegated by the Regional Minister
- to encourage the development of servant leaders and provide formation as requested.

CODE OF CONDUCT



National Fraternity of the Secular Franciscan Order in the United States

Franciscan Code of Conduct

A Franciscan gathering is a peaceful and loving place.

These aspects help ensure that all experience a welcoming, respectful, and caring environment consistent with our Franciscan charism.

- Recognize that all individuals are sons and daughters of God the Father and brothers and sisters of Jesus.
- With a gentle and courteous spirit respect diversity and confidentiality.
- Be compassionate and treat others with dignity and grace.
- Listen attentively and be respectful of other points of view*.
- As bearers of peace seek out ways of unity and fraternal harmony through dialogue and collaboration.
- All forms of disparagement, bullying, discrimination, gossiping and harassment are incompatible with who we are as Franciscans.*

Peace and all good.

*Respect/Mutual Invitation – www.usccb.org/committees/cultural-diversity-church/bicm-appendices

ELECTIONS

When do we Request for an Election?

The minister of the fraternity should request an election six months in advance of the date requested. The request should be made to the Regional Minister. The Regional Minister will confirm or request a different date that they can schedule. The Regional Minister (or their designee) will coordinate with the Regional Spiritual Assistant to have an Ecclesial Witness delegated. Once the presider, Ecclesial Witness, and date has been agreed upon, the Regional Minister (or their designee) will send the following documentation to the requesting minister:

- Letter confirming the date, presider, and Ecclesial Witness for the election
- Regional Election Guidelines

Two weeks before the Election

The slate for Fraternity Council Form must be provided to the presider of the election. It is expected that each position has at least two people nominated. If the slate cannot be completed, the election will have to be rescheduled.

Day of the Election

The role call will be taken based on the information in the National Database for this fraternity. If a quorum is present, the election will continue. If not, the election will be suspended and have to be rescheduled, or the viability of the fraternity will have to be determined. Given a quorum, the election continues as documented in the ritual. Once the election is successfully completed, the fraternity congratulates their new council, a picture is taken, and we celebrate.



**Secular Franciscan Order
St. Elizabeth of Hungary Region**

Election and Visitation Request

Fraternity:	
City/State:	OFS # (Regional)
Request for (check one): <input type="checkbox"/> Election <input type="checkbox"/> Fraternal Visit <input type="checkbox"/> Pastoral Visit	

Normal gathering day and time:	<i>(e.g. 3rd Sunday of month at 1pm)</i>
Location of gathering:	

In accordance with the OFS General Constitutions, OFS: an election, fraternal or pastoral visitation is to be held at least once every three years. Please submit election and visitation requests by the end of the prior year to the Regional Minister: Dan Spofford, OFS, 194 Garland Rd, Winslow, ME 04901 danspoffordofs@gmail.com

Preferred Dates: <i>(e.g. Nov 1, 2025)</i>	1st Choice	2nd Choice	3rd Choice

<i>Your Fraternity Minister Contact Information:</i>	
Minister Name:	
Address:	
Phone:	
Email:	

Local Minister's Signature	Date
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****Send original to Regional Minister and retain a copy****

<i>For Regional Use Only:</i>	<i>Date Confirmed:</i>	<i>Rev. 10/25</i>
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EMERGENCY FORM

CONFIDENTIAL EMERGENCY CONTACT FORM

ST. ELIZABETH OF HUNGARY REGION

Please fill out this form. Please print legibly. Place the completed form inside a sealed envelope and print your name on the outside of the envelope. Please keep it on your person during the meeting. Thank you.

Your First & Last Name:

Address: _____

Home Phone: _____ Cell Phone: _____

1st Emergency Contact First & Last Name:

Relationship: _____

Home Phone: _____ Cell Phone: _____

2nd Emergency Contact First & Last Name:

Relationship: _____

Home Phone: _____ Cell Phone: _____

Please include any other information that you would like to share below:

EUCHARIST AND THE MONTHLY GATHERING

It is true that Article 14.2 of the General Constitutions (GC) states: *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.*

It is also true that Article 53.2 states: *They should come together **periodically** (emphasis mine) as an ecclesial community to celebrate the Eucharist in a climate which strengthens the fraternal bond and characterizes the identity of the Franciscan Family.*

And the footnote to Article 42.3 indicates that profession ought to take place during the Eucharist.

Yet, Article 24 of the SFO Rule points out: *To foster communion among the members, the council should organize regular and frequent meetings of the community... (and) should adopt appropriate means for growth in Franciscan and ecclesial life and encourage everyone to a life in fraternity.*

So, Article 53.1 builds on this idea by stating: *The Fraternity must offer 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 of its members. The General Constitutions picks up on the idea of ongoing formation in Article 44.2: *The fraternity has the duty to help its own members with programs of continuing formations: a) to listen to and meditate on the Word of God, going from Gospel to life and life to Gospel, b) to reflect 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; c) to realize and deepen the Franciscan vocation.**

What does all of this say? Though the Eucharist is central in the life-style and mind-set of the Secular Franciscans and ought to be part of the fraternity's gathering on a periodic or occasional basis, like at professions or special events, it is not meant to be a regular part of the regular and frequent meeting of the fraternity because that has a different objective all together. The objective – according to both the Rule and the General Constitutions –

is what the French call a *review of life* or a faith-sharing based on the Word (*not Eucharist*) to nourish and strengthen the apostolic, ecclesial, and Franciscan dimensions of SFO life.

Source: This text comes from Benet Fonck, OFM in response to a question about whether it is required that the Eucharist be celebrated at every regular gathering of the local fraternity. (*It is found in Handbook for Spiritual Assistance to SFO*)

FRATERNAL AND PASTORAL VISITATIONS

FRATERNAL VISIT

What do we need to do to get ready for a Fraternal Visit?

For Fraternal Visits, the fraternity should review the General Constitutions Article 92-94. The fraternity should pray for the upcoming Fraternal Visit. The council should review the Fraternal Visitation Checklist and insure that all documentation is available for the Regional Minister or their representative to review on the day.

What Happens on the day of the Fraternal Visit?

The Regional Minister or their representative will meet with the council for an hour and half before the general fraternity meeting. The fraternal visitor will review all the documentation that is listed in the Fraternal Visitation Checklist and talk with the council members about their experience on council, how the council works together, effectiveness of initial and ongoing formation, how they live fraternity, and anything else they'd like to discuss.

When they meet with the fraternity, the fraternal visitor will open the visitation using the ritual. They will make opening remarks, commenting on their meeting with the council. The regular fraternity meeting will continue (prayer, formation, fraternal sharing, and business). The regional representative will address the people in formation and ask them some questions and will close the fraternal visit with the renewal of profession for all professed members.

The fraternal visitor will provide the fraternity council with a written report within six weeks of the visit. The report should be shared with the council and the whole fraternity.

PASTORAL VISIT

What do we need to do to get ready for a Pastoral Visit?

For Pastoral visits, the fraternity should review the General Constitutions Article 92,93 & 95. The fraternity should pray for a successful Pastoral Visit.

What happens on the day?

The Regional Spiritual Assistant or their representative will meet with the council for an hour and half before the general fraternity meeting. The Regional Spiritual Assistant or their representative will ask questions about the fraternity's prayer life, talk with the council members about their experience of the council, how the council works together, effectiveness of initial and ongoing formation, how they live fraternity, and anything else they'd like to discuss. If the fraternity has a Spiritual Assistant, the pastoral visitor will meet with them privately or with the council (whatever they prefer); discussing how they work with the council and the fraternity.

When they meet with the fraternity, the pastoral visitor will open the visitation using the ritual. They will make opening remarks, commenting on their meeting with the council. The regular fraternity meeting will continue (prayer, formation, fraternal sharing, and business). The pastoral visitor will address the people in formation and ask them some questions and will close the fraternal visit with the renewal of profession for all professed members.

The pastoral visitor will provide the fraternity council with a written report within six weeks of the visit. The report should be shared with the council and the whole fraternity.

FRATERNAL and PASTORAL VISIT REFERENCES from the General Constitutions and National Statutes

The General Constitutions of the SFO

Article 51

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

Article 63

2. In addition, the regional minister has the duty:
 - c. to make fraternal visits to the local fraternities, personally or through a delegate who is a member of the council;
 - g. to request the pastoral and fraternal visits with the consent of the council, at least once every three years.

Article 67

2. In addition, the national minister has the duty:
 - 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.

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.

Article 94 The Fraternal Visit

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. (Cfr. *Constitutions* 51,1c; 63,2g; 67,2g.)
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 (Cfr. *Constitutions* 83; 84.)

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.

Article 95 The Pastoral Visit

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.
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.

Statutes for Spiritual and Pastoral Assistance to the Secular Franciscan Order

Art. 2

3. The purpose of spiritual assistance is to foster communion with the Church and with the Franciscan Family through witness and sharing of Franciscan spirituality, to cooperate in initial and on-going formation of secular Franciscans and to express the fraternal affection of the religious towards the SFO (see *SFO Const* 89.3; 90.1).

Art. 14

1. The pastoral visit is a privileged moment of communion of the First Order and the TOR with the SFO. It is carried out also in the name of the Church and serves 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 SFO, and to promote its most effective insertion into the Franciscan family and the Church (see *CCL* 305.1; *SFO Const* 92.1; 95.1)

2. The visitor strengthens the fraternity in its presence and mission in the Church and in society; verifies the relation between the secular and religious fraternities; gives special attention to programs, methods, and experiences of formation; gives attention to the collaboration and sense of co-responsibility among the secular leaders and the spiritual assistants; examines the quality of the spiritual assistance given to the visited fraternity; encourages the spiritual assistants in their service and promotes their continuing spiritual and pastoral formation (see *SFO Const 95*)
3. At the request of the respective Council, a delegate of the Conference of Assistants carries out the pastoral visit, fully respectful of the SFO's own organization and law (see *SFO Const 92.2*) For urgent and serious reasons or in case of failure on the part of the minister or the council to request it, the pastoral visit may be carried out upon the initiative of the conference of spiritual assistants, having consulted the Council of the SFO of the same level (see *SFO Const 92.3*)
4. It is recommended that the pastoral and fraternal visits be carried out together, with agreement beforehand on the program. The visitor or the visitors will in good time communicate the object and the program of the visit to the council concerned. 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, appending it to the records in the appropriate register of the fraternity visited, and will inform the council of the level which has conducted the visit (see *SFO Const 93.2* and 4)
5. In the visit to the local fraternity, the visitor or visitors will meet with the entire fraternity and with the groups and sections into which it is divided. They 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, they will proceed to the fraternal correction of the shortcomings possibly encountered (*SFO Const 93.3*)

The Rule of the Secular Franciscan Order

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.

Statutes of the National Fraternity of the Secular Franciscan Order in the United States of America

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 18.8. 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.

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.



National Fraternity of the Secular Franciscan Order in the United States

Guideline: 2024-02
Creation Date: September 20, 2024
Revision Date:
Subject: Guidelines for Fraternal Records Retention

Policy: All fraternity financial records shall be kept in a secure location according to the following guidelines.

Purpose: To establish the retention schedule for administrative and financial records.

Scope: Applies to all fraternities – local, regional, national

General

Comments: When possible, important documents, legal documents, journals and ledgers according to the schedule listed below:

Type of Records	Retention Period		
	Permanent	7 Years	3 Years
ADMINISTRATIVE DOCUMENTS			
Annual Reports	X		
Contracts and Leases (expired)		X	
Contracts and Leases (still in effect)	X		
Correspondence (general)			X
Correspondence (important matters*)	X		
Council Meeting Minutes and Fraternity Meeting Minutes		X	
Fraternity Register	X		
IRS SS-4 Application for Federal Identification Number	X		
IRS Letter Notice Assigning Federal Application Number	X		
Legal Correspondence	X		
Miscellaneous Internal Reports			X
Property Records	X		
Visitation Reports		X (or last two)	
FINANCIAL DOCUMENTS			
Bank Deposits Slips		X	
Bank Reconciliation		X	
Cancelled checks		X	
Cancelled checks made for important payments**	X		
Cash Books	X		
Cash Disbursements Journals		X	
Cash Receipts Journals		X	
Chart of Accounts	X		

OFS-USA Guideline 2024-02: Guidelines for Fraternal Records Retention

Type of Records	Retention Period		
	Permanent	7 Years	3 Years
Check Book Register		X	
Contracts and Leases (expired)		X	
Contracts and Leases (still in effect)	X		
Council Meeting Minutes		X	
Deeds, Mortgages and Bills of Sale	X		
Fraternity Financial Review Reports		X	
General Ledger	X		
Insurance Records (claims, policies, etc)	X		
Invoices from Vendors		X	
Petty Cash Vouchers			X
Property Records	X		
Trial Balance (Year-End) ***	X		

- The above chart is presented to help you with decisions concerning record retention.
- The Internal Revenue Service requires records to be kept for at least three years for income and expenses related to a filed tax return. For an organization such as ours, which is not required to file tax returns under most circumstances, a longer retention would be appropriate since any review by the IRS would cover all years for which returns have not been filed. In addition, records dealing with capital purchases, such as a computer, or a car, etc., must be kept with records for the year of disposal of the asset. Another consideration is the possibility of an audit by the Executive Council since they have the right to do so at any time.
- Records should be maintained in yearly binders as well as duplicate information kept electronically on flash drives.
- Permanent records should be securely stored in the regional archives (See Regional Record Guidelines under Resources on the website).
- It is recommended that at the Regional and National level an accounting program such as QuickBooks, Quicken or Excel be utilized to facilitate record keeping. Regular back-up of information is strongly encouraged.
- All retained records are to be maintained by the council member responsible and after an election, records should be given over to the elected successor. In the event a fraternity maintains a storage unit for records, adequate security procedures should be in place.

Definitions:

* Important Matters include agreement for venues, requests for elections and visitations, fraternity, disciplinary actions taken

** Important Payments include payment for contracts, any documents pertaining to property of the fraternity

*** Trial Balance (Year-End) - A trial balance is a bookkeeping worksheet in which the balances of all general ledger accounts are compiled into debit and credit account column totals that are equal. A company prepares a trial balance periodically, usually at the end of every reporting period. The general purpose of producing a trial balance is to ensure that the entries in a company's bookkeeping system are mathematically correct.

LAPSED MEMBERS

When you have a member who has stopped coming. It would be good to consider the following thoughts on the “lapsed” issue in fraternity life by Lester Bach, OFM, Cap:

“1. It is important to realize that there are simply two categories of fraternity members: **Active** (which includes active-excused) **and lapsed**. Active excused members are those who, for valid reasons of health, family, work, or distance, request the fraternity council to be excused from the regular gatherings. The council gives the designation “active excused” if they deem the reasons to be valid. For some that may mean a permanent active excused status, for others it may be a temporary status. The fraternity council is responsible for approving such permanent or temporary status. If the status is temporary, it needs to be reviewed at the end of the specific period for which it is given. People are excused only from attendance at regular gatherings. Those who are excused are expected to continue to follow the Secular Franciscan Rule as fully as possible, which includes financial *fair share* as far as possible.

2. Regarding absentees, councils are responsible for contacting them and inviting their return or seeking at least that they communicate with the council as to their status. This may take letters, phone calls or personal visits, as the council deems appropriate. It is always done with respect for the person involved and with *“a gentle and courteous spirit...”* (SFO Rule #13)

3. The Statutes of the National Fraternity of the SFO in the USA gives this clear direction in regard to active and lapsed members: Article 18.7

*“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. GC 30.3).” A **fair share** contribution is made based on the number of active and active excused brothers and sisters, but not for those who are deemed lapsed.*

- An active fraternity member is one who participates by attending fraternity meetings and by providing financial support to the community, or whom the fraternity has excused from such obligations.
- 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 the fraternity, consciously and deliberately reject

or ignore the invitations, 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. GC 53.3)” When a member is lapsed from your local fraternity, you must send that information to the Regional Secretary who will mark them lapsed (with date) on the National Databases. They will no longer receive the Tau or the Herald. *If you feel they would still benefit from these publications, please share with them the appropriate web sites where they can view them (Nafra-sfo.org for the Tau and stelizabethsfo.com for the Herald) or make it a responsibility of someone in your fraternity to download copies and send or bring them during a visit. A nice way to keep in touch.*

ST. ELIZABETH OF HUNGARY REGION

Local Fraternity Information Update

Fraternity: *(name,city,state)*_____

Meeting Location: *(church, hall, city)*_____

Meeting Day _____ Meeting Time _____

Name, Address, Phone, Email of 2nd contact person for your fraternity:

Name of person who would like to update your fraternity NAFRA database (email address and internet access required). Access permission comes through Regional Minister. Please request. Any database changes also require notification to the Regional Secretary.

Spiritual Assistant: *(name, address, phone, email)*

Appointed by: _____ **Date**_____

SFO ordained Deacon/Priest – Date of Ordination: _____

Bishop _____

Diocese _____

Please submit to Regional Minister when any of the above information changes.

Submission Date: _____

Saint Elizabeth of Hungary Region
of the Secular Franciscan Order



Member Information Form
(for use by Local Fraternity)

Name: _____

Address: _____

Home Phone: _____

Mobile Phone: _____

Email: _____

Birthday: Month: _____ **Day:** _____

Emergency Contact Information:

Emergency Contact Name: _____

Emergency Contact Relationship: _____

Emergency Contact Phone Number: _____

MEMBERS NOT PARTICIPATING

After the approval of our Rule and General Constitutions, “isolated” brothers can no longer exist. All of us are integrated in one Fraternity, as the participation in the life of the Fraternity is one of the requirements of our vocation and an indispensable element for our belonging to the Order. For this reason, we have considered it necessary to highlight, at all levels of the Order, a problem that affects a large number of Fraternities: the absence of our brothers and sisters.

The CIOFS Presidency has prepared and approved, in April 2004, a document to be offered to all the National Councils entitled: “Handling the problem of non active members”.

(Excerpt from Cir. Let. n.18-2002-2008 dated 10/04/04 – sig. Encarnacion del Pozo, SFO General Minister)

(Part I)

Terms of the matter

With the new Pauline Rule “isolated secular Franciscans” no longer exist: they all belong to a local Fraternity and are admitted by its Council. Furthermore, participation in the life of the Fraternity is part of the Form of Professed Life.

Even before the Vatican Council it was necessary to participate in the “monthly assembly” with a certain legalistic rigor. The voluminous “Practical-Juridical-Historical Manual of the TOF” by Fr. Antonio of Sant’Elia (1947) reads “The tertiary negligent in attending the assembly... may be cancelled from the list of the Fraternity if he or she continues to be negligent”. Article 153 of the Constitutions of 1957 reads: “The tertiaries who have been warned three times and refuse to observe for a three-year period the obligations of the Third Order are to be dismissed from the Order by the Provincial Commissary taking into consideration the circumstances of places and times”.

The identify crisis suffered by some Fraternities after the Vatican Council led to a certain tolerance towards absenteeism and lack of participation in fraternal life. Many brothers and sisters wandered away, and their behavior was in no way formalized, either by themselves or by the Council. This situation was tolerated for years, and is so now, due to a lack of clear orientation on the matter.

When the system of a financial contribution based on the number of members of each Fraternity was adopted, the problem of absent members, who nonetheless were counted in statistical data, was brought into the open. Some Fraternities introduced the distinction between “active members” and “non-active members”; other even went to the point of indiscriminately “crossing out” those members who had not made an appearance for quite some time. The General Constitutions of 2000 have clarified the procedure to be used in cases of absent brothers and sisters, and this procedure is the subject of the present document.

Distinctions

The local Councils cannot treat all the absent brothers and sisters with the same criteria in due consideration of the fact that various types of hindrances exist:

1. *The elderly and the sick.* These people must be treated specially and be offered a special service by the Fraternity. The elderly have already contributed their share. If they cannot go to the Fraternity themselves, the active members must go to them and support them in every possible way, both spiritually and materially. Regarding financial contribution, they will continue to contribute, if possible, with the maximum comprehension and tolerance on the part of the Fraternity Council.
2. *Sporadically hindered members.* Those, who for any reason, are legitimately hindered from participating in the meetings, but not in a permanent manner. They must make a point of justifying their absence and give prior notice.
3. *Permanently hindered members.* They can be brothers and sisters who cannot attend the Fraternity on a permanent basis for reasons connected with their work or studies, family commitments or change of residence to a location where there is no SFO Fraternity. They do not cease to be secular Franciscans for reasons such as these. They should explain their situation to the Council and ask for exemption from attending meetings. They should try to keep up to date with the life of the Fraternity also by making their financial contribution, which is a way of showing interest and communion with the Fraternity. The Fraternity, in turn, will find the means and way to keep in touch with them.
4. *Unjustified absentees.* This case falls within the “repeated and prolonged default in the obligations of the life of the Fraternity” contemplated in art. 56.2 of the GC. The

reasons may be manifold. It is not our duty to judge or condemn these brothers, but neither can we ignore their “default”.

The first three hypotheses of absences indicated above were dealt with in circular n.11/0-08 dated February 22, 2004 of the Formation Commission. This Commission is also conducting a survey to investigate on the extent of the phenomenon and gather indications on the initiatives and proposals to adopt in such cases.

The fourth hypothesis, that of unjustified absentees, defined by the GC as “members in difficulty” requires not only pastoral but also juridical action for the possible adoption of provisions foreseen by the Constitutions.

(Part II)

How to deal with “members in difficulty”

Each case should be treated individually according to the provisions of the Rule, n. 23: “Members who find themselves in particular difficulties should discuss their problems with the Council in fraternal dialogue”. Two different hypotheses are provided for by the GC: temporary provisions and definitive provisions.

Temporary provisions: consist in temporary withdrawal or temporal leave from the Fraternity, *on the initiative of the brother or sister in difficulty (GC art. 56.1)* or in suspension *by decision of the Council (GC art. 56.2)*, to be communicated in writing to the person concerned.

Withdrawal from the Fraternity, whether voluntary or as a result of suspension, must be noted in the register of the Fraternity. It involves exclusion from the meetings and activities of the Fraternity and the loss of right of active and passive voice, but membership in the Order itself is not affected, in conformity with the GC art. 56.3.

Readmission is provided for in the GC art. 57.

Definitive provisions: in this case also it is necessary to distinguish between definitive *voluntary* withdrawal and *dismissal (expulsion)* from the Order. The way to proceed is described in the GC art. 58.

1. In cases of voluntary definitive withdrawal from the Order, the person concerned submits a request to the Minister of the Fraternity. The latter, after a fraternal

dialogue with him or her, informs the Council. The Council makes its decision with a secret vote and communicates it in writing to the person concerned. Definitive withdrawal is recorded in the register of the Fraternity and communicated to the Council of the higher level.

2. Very serious reasons are required for dismissal (expulsion): “serious causes, external, imputable, and juridically proven “ (art. 58.2). The same applies to cessation, specifically referred to cases in which the brother or sister “publically rejects the faith or defects from ecclesiastical communion or upon whom an excommunication is imposed” (art. 58.3). We shall not deal with these cases here except for saying that these extreme provisions are in any case competence of the Council of the higher level, at the suggestion of the local Fraternity Council.

Procedures to follow

Leaving aside the cases indicated in the above point 2, clarifications are given below on the procedures to be followed for temporary provisions and for definitive voluntary withdrawal from the Order.

The first signal of a difficult situation on the part of a brother or sister is manifested by his or her long and systemic absence from the meetings (or sporadic participation) without a justified reason. It is therefore necessary for the Council to ask the Secretary to keep a register of attendance and communicate to the Minister the names of the brothers and sisters of whom there is no news. It would be desirable for the person concerned to expose his or her difficulties to the Minister or another member of the Council on his or her own initiative, but – if this is not so – the Minister must start the dialogue.

If situations of unjustified hindrances emerge from the personal contact, the Minister must submit the case to the examination of the Council in the next meeting.

In the case of provisions *requested by the person concerned* (temporary leave or definitive withdrawal from the Order) the matter must be treated with great discretion by the Council: it is necessary to be careful not to expose the brother or sister to the judgement of others.

In the case of provisions *to be taken on the initiative of the Council* (suspension or expulsion from the Order) it is important to reflect very carefully because these situations are more “thorny”. A careful action of animation and recovery by the Council is, therefore,

necessary, with the special help of the Spiritual Assistant. If it is not possible to overcome the reasons of the “difficulty” of the person concerned, he or she is amicably asked to withdraw from the Order (temporarily or definitively). Only when all these attempts prove to be useless, shall the Council make its own decisions. Of course, these decisions are not easy, but the co-responsibility of the members of a Council demands that they must not avoid taking care of such cases, should they occur, for the glory of God and love of the Order.

This issue is further proof of how important it is for each brother and sister to have a personal (numbered) folder in the local Fraternity, where all events in his or her fraternal life are registered, beginning from admission right up to death, to the transfer to another Fraternity or definitive withdrawal from the Order. This contributes to the organization of the Fraternity and to its history, because the life of each brother or sister composes the fraternal life of the SFO.

Regarding the minutes of meetings, due to their nature, it is advisable that they be drawn up separately from the matters of ordinary Council management so that the documentation will be readily available in specific minutes if it becomes necessary to send it to the regional/national Council.

Summary of steps to be taken

1. Verify who the absentees are, for how long they have been away from the Fraternity life and for what reasons.
2. In the case of unjustified reasons, discuss the matter with the brothers or sisters in a special Council meeting after reading the pertinent points in the Rule (n.23) and the Constitutions. (articles 56 – 59)
3. After studying our legislation, the Minister and the Spiritual Assistant must promote a fraternal dialogue with the brothers and sisters concerned and try to lead them back to fraternal communion.
4. Note down the result of the dialogue in the specific minutes of the Council meeting.
5. After the time allowed to the brother or sister to return to the Fraternity, in the event that he or she has not resumed normal participation in fraternal life, comes the time to:

- Visit again the person concerned, guiding him or her on how to write the request for *temporary withdrawal* from the Fraternity;
 - Clearly explain that after the length of time agreed upon (or even before it expires) he or she may ask to be re-admitted by addressing a written request to the Minister. Guide him or her on how to write this in due course
 - In the pertinent extraordinary Council meeting, record in the minutes of the meeting all the steps taken as well as the decision made.
 - Communicate the decision of the Fraternity Council to the person concerned via registered letter with notification of receipt.
 - File all the notifications of receipt of the correspondence sent, together with copies of the letters, in their personal folder, where all the documentation on the case should be kept.
6. If the brother or sister has asked for *temporary withdrawal* and then does not return to fraternal communion, the Fraternity Council may apply article 56.2 of the GC and decide on *suspension*.
 7. In the case of *definitive voluntary withdrawal* from the Order, the local Council must send the Minister of the higher level a copy of the minutes of the meeting and of the correspondence relating to the case.
 8. The Fraternity must specifically record these cases in the book of the minutes of the Council meetings. The documentation relating to each individual case must be filed in the personal folder of the brother or sister in question.

MEMBERS NOT PARTICIPATING – SAMPLE LETTER

The following is a sample letter to a member who is not attending, and the council wishes to reach out. We do not know the author of the letter, so we cannot give them credit. We thank whoever wrote it and acknowledge it is a great starting point for composing your own letter to a member who isn't attending fraternity meetings.

Date

Dear Franciscan Brother (or Sister),

Date

In our spiritual life, there are periods of jubilation and joy as well as times of trial such as a “dark nights of the soul” when we do not feel the “touch of God” in our life. Sometimes it is just a sense of priority where “life” intervenes in spite of our good intentions and the next thing we know, it has been some time since we gathered with our spiritual brothers and sisters. This journey is not unusual and is often expected in our spiritual life but it is also how we cope and meet these challenges that makes the difference.

These trials occur in our Franciscan journey as well and we are wondering if you are experiencing one of these trials. We have been noticing that you have *not* been attending the fraternity meetings, which are an indispensable assist on your journey. After reaching out to you, we have not consistently heard from you, or seen you at our meetings, nor have we received any contributions to the common fund. We can only assume that you do not want to be active in your Franciscan spiritual journey at this time. Perhaps, Secular Franciscan participation is not right for you at this time of your life.

Your absence from fraternity life saddens us since you add to our fraternity life and you are missed. The absence of one of our brothers (or sisters) leaves a hole in the fabric of our fraternity- your unique contribution. Your commitment to life in fraternity was made at the time of your profession. It is what we sign up for when we say, “yes” to God and the Council is saddened by your absence.

So, we ask that you contact the Council as soon as possible and let us know your feelings about your Franciscan spiritual journey. If we do not hear from you, in all justice to the rest of the faithful members, we must lapse your name from the active fraternity roster. Of course, you will still remain a Secular Franciscan for life and can return to active participation at any time by contacting the fraternity minister.

Our prayers are with you in this spiritual journey.

Peace and all good.

Your brothers and sisters in St. Francis,

Minister

(on behalf of the Council,)

Fraternity Name

Secular Franciscan Order

Contact: (phone) ____ - ____ - _____

Membership Status Change Form
Secular Franciscan Order St Elizabeth of Hungary Region

Fraternity Name	
Fraternity City/ State	
Fraternity Number	
First Name	
Last Name	
Primary Street/ Apt Address	
Primary City/ State/ Zip Code	
Telephone (Main)	
Telephone (Cell)	
E-mail Address	
Birthdate (at least year required for Inquiry)	
Change Effective Date:	
Formation Status:
Aspirant (Orientee)	<input type="checkbox"/>
Aspirant (Inquirer)	<input type="checkbox"/>
Candidate - Acceptance	<input type="checkbox"/>
Temporary Professed	<input type="checkbox"/>
Professed	<input type="checkbox"/>
Ecclesial Witness (for Profession)	
Status Change:
Active	<input type="checkbox"/>
Lapsed	<input type="checkbox"/>
Deceased	<input type="checkbox"/>
Active - Excused	<input type="checkbox"/>
Temporary Withdrawal	<input type="checkbox"/>
Definitive Withdrawal (requires National Notification)*	<input type="checkbox"/>
Suspended (requires Regional Approval)	<input type="checkbox"/>
Dismissed (requires National Approval)*	<input type="checkbox"/>
Minister Name:	Minister Signature:
Designee (if not signed by minister):	
Notes/Other:	
Date Submitted:	

This form is to be used for all membership status changes except Transfers. Please complete applicable change sections and email or send to the Regional Secretary who will update the National Database. Incomplete forms will be returned. The fraternity minister (or designee) must sign this form or type in their name as an authorized signature. Transfers are to be completed on the Transfer Form. *For submittal to National, "Contact Us" form must be used by database administrator. 3/2025

MINISTER'S ANNUAL REPORT -YEARLY FRATERNITY SELF EVALUATION

Yearly each minister, with the support of the council, writes an annual report to the region. This is a chance for a minister to reflect on the fraternity and work with the council and members to make changes where necessary.

The Regional Executive Council is suggesting that each fraternity spend time re-evaluating their vitality annually. We suggest that a worksheet be generated by the formation team and given out at the October meeting. At the fraternity's November meeting the on-going formation session would be used to dialogue on the fraternity's spiritual, formational, social, and apostolate vitality; answering the question: are we active, visible, and joyful in all these aspects of our fraternal life? If not, what do we need to do? Where do we need to begin again or begin for the first time? If we are doing well in one of these areas, how could we do even better? From this meeting, the council will use the recommendations to generate the next year's calendar.

If we work on the spiritual, formational, social, and apostolates health of our fraternities, our fraternities will truly blossom and be what they are called to be. We must be willing to look at our fraternities prayerfully and honestly and be willing to begin again if necessary to truly live our Franciscan rule.

In the Summer 2014 Tau, Deacon Tom Bello, OFS wrote an article entitled "A "Trinity of Be-Attitudes" with an "Examination of Conscience" Concerning the Vitality of our Fraternities. This article can be found on the NAFRA website and in the book "For all the Saints: St. Francis's Five Point Plan for Salvation" by Deacon Tom Bello, OFS.

Tom came up with a set of Be-Attitudes to be used to test the vitality of our fraternities and with each be-Attitude an examination of conscience. He stated:

Be-Attitude Number One for the Vitality of our Fraternities: Be **active** Spiritually, in Formation, Socially, and Apostolically!

Examination of Conscience: If a stranger were to walk in off the street to attend your next fraternity meeting, how would he know that your fraternity was “alive and kicking”? What signs of life have your fraternity actually DID SOMETHING other than attend a dry business meeting? What did it do?

Be-Attitude Number Two for the Vitality of our Fraternities: Be **visible** Spiritually, in Formation, Socially, and Apostolically!

Examination of Conscience: Does anybody in your local parish, community or diocese, your local pastor, other local priests, the Bishop, know your fraternity exists or know when and where you meet or what you do? How many know? Who are they? How would they know? When was the last time public mention was made of your fraternity in the local media?

Be-Attitude Number Three for the Vitality of our Fraternities: Be **joyful** Spiritually, in Formation, Socially, and Apostolically!

Examination of Conscience: If a young person were invited to your next fraternity gathering, would she or he feel enough joy in your fraternity’s walk with Saints Francis and Clare in the footsteps of Christ to want to come back and share that joy permanently?

MINUTES, COUNCIL, SAMPLE

(Fraternity Name) Council Minutes
Date
Scheduled Time - In Person or via Zoom

Present:

Excused:

Absent:

TOPIC	
Opening Prayer	Ritual p38/ New Ritual p63
Secretary's Report	Discussion: Motion to Approve: 2 nd by:
Treasurer's Report	Discussion: Motion to Approve: 2 nd by:
Formation Director Report	Initial Formation: On-Going Formation:
Old Business	•
New Business	•
Next Fraternity Gathering Date	
Next Council Meeting Date	
Closing Prayer	Ritual p 39/ New Ritual p64

Submitted by
Secretary

MINUTES, FRATERNITY, SAMPLE

(Fraternity Name) Fraternity Minutes
Date
(Location and Time)
(In Person or Via Zoom)

Present:

Excused:

Absent:

Guest/s:

TOPIC	
Social Time	Welcoming and life sharing
Opening Prayer	“Old” Ritual p 35/ “New” Ritual p 57 Special Intentions for: Decade of the Rosary
On-Going Formation	Reflections: Gospel: Essential Documents: On-going Formation:
Secretary’s Report	Key notes from past Secretary report. Discussion: None Motion to Approve: 2 nd : Approved:
Treasurer’s Report	Checking Balance: \$ Saving Acct Balance: \$ <u> </u> (as of Date) Discussion: The following transactions were made (Deposits/Expenditures) Motion to Approve: 2 nd Approved
Regional/District Updates	
Formation Director Report	Initial Formation: <ul style="list-style-type: none"> • Inquiry: • Candidacy: 2026 On-going Formation Calendar On-going Formation:
Old Business	

TOPIC	
New Business	
Next Fraternity Gathering Date and Time	Initial Formation: Fraternity Gathering:
Next Council Meeting Date and <u>Time</u>	
Closing Prayers	Liturgy of the Hours "Old " <u>Ritual</u> p 36 /"New" Ritual 59
Apostolate	

Prepared by:
Secretary

Profession and Membership Status Primer

This applies to persons associated with the Secular Franciscans from visitors through formally professed. Remember that you need to select **Religious Order** on either the Person Create or Person Edit form. In addition to the *Path to Profession* dates it will expose the **Profession Status** and change the available options in **Membership Status*** drop down.

I. Profession Status:

The choices for OFS related persons are

- Visitor
- Aspirant (Orientee)
- Aspirant (Inquirer)
- Candidate
- Professed
- Temporary Professed
- Affiliate.

Only Candidates and Professed (permanent or temporary) are counted for Fair Share.

II. Membership Status:

1. Professed Members can have a status of

- a. 01- Active: they regularly attend and participate in the life of a fraternity.
- b. 02 – Lapsed: someone who no longer attends meetings, does not financially support the fraternity, has not been excused from these obligations by the council, has declined repeated invitations to return to fraternity (date of council decision to mark as “lapsed”), can be reversed by the council upon request of the individual (date of council decision)
- c. 04 – Active Excused:
 - Professed members who cannot actively participate in community life on a regular basis because of health, family, work or distance. They are in communication with and support the fraternity if they are able.
 - Local council needs to maintain regular contact. (GC 53.3; NS 18.10) (date of council decision to mark “excused”)
 - second date for annual status review.
- b. 03 – Deceased: (date of death)
- e. 06 – Temporary Withdrawal: (from the Fraternity)
 - *voluntary* withdrawal from the fraternity (not from the Order) (GC 56.1)
 - officially requested in writing by the individual, approved by the council (date of council Decision) and noted in the fraternity register.
 - Involves exclusion from fraternity meetings and activities.
 - Can be reversed by the council upon request of the individual if the council agrees that the circumstances leading to the withdrawal have been overcome (date of return to active status).
- f. 07 – Definitive Withdrawal: (from the Order)
 - voluntary withdrawal from the fraternity and from the Order (GC 58.1)
 - officially requested in writing by the individual and approved by the council (date of council decision)
 - not reversible

g. 08 – Suspended (from the Fraternity)

- removed from the fraternity for serious cause (GC 56.2) by vote of the council (date of council decision)
- involves exclusion from fraternity meetings and activities
- suspension can be reversed by the council upon request of the individual if the council agrees that the circumstances leading to the suspension have been overcome (date of council decision)

h. 09 – Dismissed: (from the Order)

- removed from the fraternity and from the Order (GC 58.2-.4) for “grave reasons that are external, imputable, and juridically proven” by vote of the council (date of council decision).
- must be declared by the council of the higher level (date of Regional Council decision)
- (date of confirmation by National Council)
- Not reversible.

A Candidate, Aspirant (Orientee), or Aspirant (Inquirer) can have a status of:

- 01-Active: they are regularly attending and participating in the life of a fraternity.
- Leave of Absence: they cannot participate in the fraternity for some reason (e.g., taking care of a sick relative out of area, work commitment)
- 03- Deceased: they have died.
- Asked to Leave – The council has asked them not to return to gatherings. Their life or behavior is incompatible with the life of the fraternity. The reason should be given in the notes. *Flagged as Not Completed.*
- Voluntary Withdrawal – They have decided that the life is not for them either permanently or at the current time. – *Flagged as Not Completed.*
- Lapsed - No longer attends formation sessions without notice. *Flagged as Not Completed.*

Affiliates can have a status of:

- 01-Active: they are regularly attending and participating in the life of a fraternity.
- Leave of Absence: they cannot participate in the fraternity for some reason (e.g., taking care of a sick relative out of area, work commitment)
- Asked to Leave
- Voluntarily Withdrew
- Lapsed
- 03- Deceased: they have died.

Visitors can have a status of:

- 01-Active: they are regularly attending and participating in the life of a fraternity.
- Asked to Leave
- Inactive
- 03- Deceased: they have died

- III. As you change status you need to change the respective dates.
- If a person is in Active Excused status you need to set both the **Excused Date** and the **Excused End/Review Date**
 - If a person is Lapsed fill in the **Lapsed Date**.
 - If they are in Temporary Withdrawal set the **Temp Withdrawal Date**
 - If they are suspended set the **Suspended Date**
 - If they return from either Lapsed, Temporary Withdrawal or suspended, set their **Readmit Date**
 - If they definitively withdrawal set their **Definitive Withdrawal Date**.
 - If they are dismissed set the **Dismissed Date** when the council dismisses the person. Put the date when NEC concurs in the **Notes**.
 - If a member has requested a Leave of Absence fill in the **Leave of Absence Date**. Note the expected return in the notes.
 - If a person was Asked to Leave by the council, fill in the **Asked to Leave Date**.
 - If a person has voluntarily withdrew, fill in the **Voluntarily Withdrew Date**.
 - If a visitor has become inactive, fill in the **Inactive Date**.

Matrix of Valid Membership Statuses:

Status	Professed/ Temporary Professed	Candidate, Aspirant (Orienteer or Inquirer)	affiliate	visitor
01-Active	x	x	x	x
03-Deceased	x	x	x	x
04-Active-Excused	x			
06-Temporary Withdrawal	x			
07-Definitive withdrawal	x			
08-Suspended	x			
09-Dismissed	x			
02-Lapsed*	x	x - Not Completed	x	
Voluntarily Withdrew*		x - Not Completed	x	
Asked to leave*		x - Not Completed	x	x
Leave of Absence		x	x	
Inactive				x

*These Status Values flag the member as **Not Completed** for those in Aspirancy/Formation

REGISTER UPDATES

When should the Fraternity Register be updated?

A person is added to the register when the rite of admission is performed (General Constitutions Article 39.4):

From that point forward updates are made for changes in status, including the following:

- When they are professed, the date and priest presiding are added.
- Person stops coming to meetings and after following the procedure to try to bring them back they refuse to respond or they state that they cannot come back at this time, the fact that they are lapsed should be recorded with the date.
- person withdraws (temporarily or permanently)
- person transfers
- person is dismissed
- person dies

All fraternal visitations, pastoral visitations, and elections should be included in the Fraternity Register or in a separate register.

RELOCATING A FRATERNITY

The topic of relocating a Fraternity has come up a few times in the Region. Here are some guidelines. Although our Document of Establishment notes the parish or place where we initially held our meetings, many of our fraternities are no longer meeting where they started out. There are many reasons why fraternities move – parish closings, changes in parish needs or facilities, changes in the fraternity’s demographics, growth, hopefully! Sometimes we are forced to move. Other times, there may be a gradual sense that the place where we meet no longer meets the needs of the fraternity.

It is important to note that a Secular Franciscan Fraternity is not a parish organization. Though our bonds with the parish or place where we meet may be strong, we are there at the pleasure of the Guardian, or Pastor, and parish governance. We are essentially mendicants, without property or “right of place”. We continue to be established and bonded to a Friar Province of one of the four 1st Order obediences (OFM, Capuchin, Conventual or TOR). We are present in a Diocese with the permission of the Local Ordinary. If a move involves a change in Diocese, the Provincial Spiritual Assistant should obtain permission from the new Local Ordinary.

The place and time of our regular Fraternity Gatherings is of utmost importance. We have seen more than one fraternity in tremendous stress when a change in place or meeting time occurs. Here are a few guidelines to help a fraternity focus on its basic needs when considering a move. It must be said, although it ought to go without saying, that the entire discernment process needs to be wrapped in prayer, both individually and communally.

Here are some steps to consider:

Step 1 – Begin, and continue, in prayer

At the very outset, before any of the other steps are taken, the Fraternity should pray together. This prayer can take many forms, but should be specific as to intention – the guidance of the Holy Spirit and the intercession of our Holy Father Francis in the process of discerning a change in meeting place for the Fraternity.

For the duration of the process, the brothers and sisters should commit to regular personal prayer for the same intention. Perhaps the brothers and sisters can commit to a time of adoration, praying the Franciscan Crown, or other devotion.

Step 2 – Understand the source of the need or desire to make a change.

Rumors can fly in a parish when there are winds of change. The Fraternity Council needs to assure the fraternity that they are aware of the potential changes that could occur and are in dialog with the pastor and parish council. The fraternity should not make a move based on what “might” happen. Rumors are unhealthy and should be discouraged.

Sometimes the desire for a move comes from one or two members based on the interest shown by a pastor of another parish to have a Franciscan presence. This can be very attractive, particularly if the place where the Fraternity meets is not as welcoming or accommodating as you would like. Individuals who desire a change under these circumstances need to be counseled that this is a decision of utmost importance to the entire fraternity, and that there is a process that must be followed. Pastors come and go, but a Fraternity is established for life.

If a parish or meeting place is scheduled to be closed, the Fraternity Council needs to set expectations right away with the membership of how the search for a new place will be conducted and start laying the groundwork for a move.

Step 3 – Set the ground rules for a search with the entire fraternity.

First and foremost is the **rule of confidentiality**. Any discussions about a potential move **MUST** be kept within the Fraternity. As close as individual members may be to the “powers that be” of prospective meeting places, they must not discuss the deliberations of the Council or the Fraternity with them. All fact finding and updates should be through an appointed committee under the direction of the Fraternity Council (see Step 5.). **The decision on place will involve the entire Fraternity** (See Step 7 for the voting procedure.)

Step 4 – Discuss the needs of the fraternity and the priority of those needs with the entire fraternity.

- The entire Fraternity should have input to what is important in a meeting place. This list should be compiled at a full Fraternity gathering, advertised well in advance. If members cannot attend the gathering, input to the list can be gathered by phone or email.

Step 5 – Appoint a committee of at least 3 professed members to carry out the research.

The Fraternity Council should select a committee of professed members to carry out the search for potential meeting places. The Council should provide specific guidance for what the committee should do, the expected timeframe for the search, and how often they should update the Council. If possible, have the committee arrange for viewing of a potential space by the Council, and if possible, the membership.

Step 6 – Present the search results to the entire fraternity, using the needs/priorities framework to compare the potential locations.

- If the Fraternity’s current location is one of the options, it should be evaluated on the same criteria as the other locations being considered.
- Allow time for questions about the location if the members have not seen it themselves.
- A vote is taken to decide on the selected location (See Step 7).

Step 7 – The professed members vote in a secret ballot which location they feel is best.

- Be sure to make the members aware of when the vote will take place.
- The same rules should apply for this vote as for an election: that is, a quorum needs to be present, and a simple majority is required for a choice. If there is a tie, or a lack of majority, a second ballot should be taken. If there is still a tie, or lack of majority, the third ballot is taken for just the top two “candidates”.
- The members should be encouraged to vote for the entire community, not just for their personal preference.
- The Fraternity Council must be ready to abide by the members’ vote regardless of their own preferences.
- The **Rule of Confidentially** must be observed until the Fraternity Minister has informed the current and new locations of the decision.

Step 8 – Once the decision is made, the Fraternity Council manages the transition and keeps the members informed at each step.

- When the Fraternity has voted on a choice, the Fraternity Minister should meet with the Pastors or Guardians (both current and new) as soon as possible to inform them of the decision and to work out a timeframe for the move.
- The committee should remain in place to assist with the transition with the Council’s direction.
- A transition to a new location is cause for celebration, and an opportunity to introduce the new community to the OFS. If the new location is a parish, consider a reception with refreshments after one of the parish Masses.

Step 9 – End in prayer!

- The Fraternity should come together in a prayer of thanksgiving for the guidance of the Holy Spirit and the intercession of St. Francis, and for God’s blessing on the new beginning.

RESOURCES NEEDED BY A LOCAL FRATERNITY MINISTER/COUNCIL/ FRATERNITY

- The Rule of the Secular Franciscan Order
- The General Constitutions 2000
- The National Statutes – USA
- Index of OFS Governing Documents
- Rule of the Secular Franciscan Order
- The Ritual of the Secular Franciscan Order
All above resources are available at <https://www.secularfranciscansusa.org/>
- Handbook for Secular Franciscan Servant Leadership
https://www.secularfranciscansusa.org/wp-content/uploads/Servant_Leadership_Handbook_Aug_21_2024.pdf
- National Guidelines and Forms
<https://www.secularfranciscansusa.org/guidelines-forms-other-resources/>
- Regional Governance www.stelizabethsfo.com
- Formation Director's Manual
<https://stelizabethofs.org/formation/>
- FUN Manual
<https://www.secularfranciscansusa.org/wp-content/uploads/FUN-Manual-2022.pdf>
- The Regional Council Directory (*Confidential and distributed 3-4x/ year from region*)
- Handbook for Spiritual Assistance to SFO and Franciscan Family Connections (for Spiritual Assistants) (*Smoky Valley Printing*)
- The fraternity's canonical establishment papers or letter of attestation. (*Document of Establishment*)
- The Fraternity's book of professions, deaths, transfers, excused, lapsed membership, visitations, elections (*Fraternity Register*)
- The Fraternity's Financial Statement and Budget

Gospel to Life Bookstore

<https://gospel-to-life-bookstore.square.site/>

Smoky Valley Printing

<https://www.secularfranciscansusa.org/wp-content/uploads/Smoky-Valley-ad-2025.pdf>

The following resources are available at:

<https://www.secularfranciscansusa.org/guidelines-forms-other-resources/>

Guidelines, Forms & Other Resources

National Forms and Guidelines

[-] National Guidelines

2024-03. Guidelines for Fraternal Accompaniment 2024-07. Guidelines for Affiliates

- 2024-07. Guidelines for Affiliates
- 2024-03. Guidelines for Fraternal Accompaniment
- Guidelines for Virtual Meetings
- Franciscan Code of Conduct
- Guidelines for Fraternal Record Retention
- Guidelines for Determining Stipends
- Guidelines for Councils in Conflict
- Guidelines for Suspension or Dismissal or Removal from Office
- Guide to the Canonical Establishment of a Secular Franciscan Fraternity
- Regional Archives
- Guidelines for the OFS Concerning Prison Ministry
- Clarification on Sexual Orientation and Sexual Identity Issues
- Fraternal Life during Social Distancing
- OFS-USA Guidelines for Nominations from the Floor
- National Election Procedures
- Procedures for OFS Members Who Enter an Invalid Marriage or A Same Sex Civil Union
- Belonging to the Secular Franciscan Order

Regional Forms

Regional Visitation Documents

- + Regional Election Documents
- + Regional Guidelines Template

Treasurer Forms and Guidelines

- + OFS-USA Treasurer's Documents of General Interest
- + National Treasurer Forms and Guidelines
- + Regional Treasurer Report Forms
- + Local Treasurer Reporting and Record Keeping

Other Resources

- + OFS Governing Documents
- + For Up to Now (FUN Manual)
- + Vocations Tool Kit
- + Graphics and Images
- + Miscellaneous Items



Guideline: 2024-06
Creation Date: September 21, 2024
Revision Date:
Subject: Guidelines for Determining Stipends

The National Fraternity Council, with input from the Conference of National Spiritual Assistants (CNSA), discussed the issue of stipends. The following points were agreed upon.

- (1) The cost of travel, room and board and other legitimate expenses should always be covered for those who are serving the Secular Franciscan Order in an official capacity.
- (2) Spiritual Assistants should receive reimbursement for the cost of travel, room and board and other legitimate expenses related to their ministry. Additionally, they should be offered a stipend over and above expenses (i.e., love offering) in an amount "appropriate to the journey made and the length of stay required" (NS 18.8 and 26.2). This stipend should always be offered for the regular meeting of the Fraternity, a meeting of the Fraternity Council, Pastoral Visitations, Elections or other events where their presence is requested.
- (3) Secular Franciscan Spiritual Assistants should be treated in the same manner as Friar Spiritual Assistants and other non-OFS Spiritual Assistants. Their expenses should be covered, and a stipend offered, as above.
- (4) Fraternities should offer a stipend to OFS Members who conduct a Fraternal Visitation or an Election, over and above covered expenses, (i.e., love offering) in an amount "appropriate to the journey made and the length of stay required" (NS 18.8 and 26.2).
- (5) OFS Regions are free to suggest to their local fraternities the amount of the stipend offered over and above expenses.
- (6) OFS members who serve the Order in capacities other than Spiritual Assistance, such as presenting at a retreat or workshop, etc., should be offered a stipend over and above expenses.

It is important to note - OFS members who receive stipends, over and above expenses, may opt to donate back to the Region, or to NAFRA, or to a charity. It is recognized that all OFS members who volunteer time to serve the Order in a variety of ways, do so in a spirit of generosity and fraternal service. This expression of our charism is a gift to the Order.

Guideline approved by National Fraternity Council on September 21, 2024

WAKE AND BURIAL WISHES OF _____

As a Secular Franciscan, I wish to have the following arrangements made in the event of my death:

REQUESTS	YES	NO	OTHER/Specify
Secular clothing and Tau cross			
Wake Service with Secular Franciscans			
Secular Franciscans remembered in will			
Honor Attendants			

Family Contacts

Name :	Relationship
Address:	
Telephone Number:	
Name:	Relationship
Address:	
Telephone Number	

Inform Funeral Director/Family Members

Yes No

Of your membership in the Secular Franciscan Order		
If OFS should be printed on your memorial cards		
If OFS should be suffixed after your name in the newspaper		
If OFS should be printed on your burial stone		

Readings	Selected Music
First Reading:	Processional:
Second Reading:	Offertory:
Franciscan Reading:	Communion:
	Recessional:

Inform Family Members:

Name of Church _____

Where to give or who should receive your Franciscan memorabilia: books, Liturgy of Hours, ring etc.

Luncheon or gathering after service? Place _____

I understand that these requests are not legally binding

Signature _____ *Date* _____

(Print name in full) _____

After completing this form, please share copies with your family and with your Fraternity Minister.

WEARING OF A "HABIT" BY SECULAR FRANCISCANS

(Circular 41-02/08, guidance and direction regarding the wearing of a habit by Secular Franciscans)

In the opinion of the Juridical Commission, Secular Franciscans were reminded that their apostolate is the personal witness that they offer to the society in which they live - in their families, in their workplaces, in their local communities and in the Church. This witness must be recognized by others through the way in which they live and love each other as brothers and sisters ("see how they love one another"). It is this witness that is to be the "sign" of the Secular Franciscan presence in the world, not any habit, dress or uniform. The Juridical Commission also reminded Secular Franciscans that a "habit" is the sign of the religious friar, not the secular. The SFO General Constitutions further remind us that "The secular state characterizes our spirituality and our apostolic life and is expressed according to our respective conditions; that is, contributing to building up the Kingdom of God by our presence in life-situations and in temporal activities" (CC. GG. 3,1-2).

With respect to wearing a habit within the Secular Franciscan Order, the opinion of the Juridical Commission is clear. Local fraternities of the SFO must not use a habit as part of their fraternal way of life and should not practise the rite of "taking the habit" in admitting new candidates. Rare exceptions to this direction is provided for fraternities who have been in existence for hundreds of years (ie. "ancient" fraternities) and whose fraternal life has included the wearing of a habit as part of their fraternal way of life, based on their spiritual and cultural history. Permission to wear a habit is provided in these circumstances as a rare exception based on a long history and tradition. However, this exception is not intended to imply that, if some fraternities wished to go back to the days when habits were permitted, other exceptions could be granted. As a general rule, the wearing of a habit by Secular Franciscans is not permitted.

In addressing this subject, reference should be made to the SFO Rule (Article 23) which states that "... the distinctive Franciscan sign (is) regulated by the statutes." The General Constitutions (Article 43) further state that "The national statutes establish ... the distinctive sign of membership in the Order (the "Tau" or other Franciscan symbol)." And, in most countries, National Statutes specify that the distinctive sign for Secular Franciscan is a form of the Tau cross. It is also important to note that all Secular Franciscans within a nation fall under the jurisdiction of the National Fraternity of that nation, irrespective of the Province of friars who established the fraternity and are bound by the provisions of their respective National Statutes.

"The Juridical Commission of the CIOFS Presidency is of the opinion that, in obedience to the Rule, the Constitutions and the Ritual, local Fraternities of the SFO cannot continue practising the rite of "taking the habit" in admitting new candidates, who in turn, must not use a habit, under the responsibility of the respective Councils and Ministers. It insists, furthermore, that each National Council of the constituted fraternities is responsible for ascertaining that the distinctive sign established by their National Statutes is respected and that each of the provisional National Councils are respectful of the decision taken in the Chapter. The above mentioned sign must be in harmony with the secularity of the SFO." (Circular 41-02/08, dated May 28, 2006)

For more information on this subject, please consult the CIOFS website at <http://www.ciofs.org/circ/pva6en41.html>.<http://www.ciofs.org/circ/pva6en41.html>.

WEBSITE RESOURCES

Many documents are available on our regional website:

<https://stelizabethofs.org/resources/documents/>

Online copies of the Regional “Herald” are available at:

<https://stelizabethofs.org/resources/herald/>

Updated OFS information, Tau, and documents are available on our national website:

www.secularfranciscansusa.org

WEBSITES	
Regional Website	www.stelizabethofs.org
National Website	www.secularfranciscansusa.org
International Website	https://ciofs.info
Franciscan Resources	www.FranciscanTradition.org
Franciscan School of Theology	www.fst.edu/degrees-programs/personal-enrichment/
Auspice Maria (Bishop James Ruggieri OFS)	