

# GENERAL CHAPTER 2020 (2021)

## INSTRUMENTUM LABORIS: Animate & Guide with Servant Leadership

### INTRODUCTION

#### 1. Background

The origins of the Secular Franciscan Order (OFS) lead us back to the Penitents of Assisi. And, of course, we have good reason to evoke this past, when it is precisely next year, 2021, that we will celebrate 800 years of the approval by St. Pope Honorius III of the *Memoriale Propositi*. This document became the first Rule approved by the Church for those "converts" who lived in their homes. Under this Rule, the men and women who followed Saint Francis were embraced as part of the Franciscan family, interpreting and living it according to the spiritual teachings of the Saint. The 2021 General Chapter will include time to deepen and honor our origins, focusing on the *Memoriale Propositi*.

This *Instrumentum Laboris* should serve as preparation for the celebration of the 2021 General Chapter, which constitutes the highest governing body of our OFS<sup>1</sup>. We will remind the OFS brothers and sisters around the world, first of all, of the path we have taken since in 2014, when we reflected on the topic *How to manage a worldwide Order like the OFS*. Not only was this the central theme of the 2014 General Chapter, but it was the basis of study, evaluation and projects, which the vast majority of the Fraternities of the world worked on for three successive years until the General Chapter of 2017. This was a theme that fit very well within the framework of the celebration of our Rule approved by St. Paul VI in 1978, as we set out to examine our commitment as Secular Franciscans in these last 40 years.

In the 2017 General Chapter, we discussed the responses we received from the national Fraternities and we dialogued on the concrete proposals made at the same Chapter. These can be found in the Chapter Conclusions. They related to the following areas: Formation, Communication, Finance, JPIC, Youfra and Leadership.<sup>2</sup>

For the last three years, the CIOFS Presidency has taken its responsibility to follow up on these proposals: it tried to clear doubts and concerns, discussed procedures, and worked on concrete plans on how to carry out the Chapter's proposals, based on the areas mentioned above. An important preliminary step was the revision of the International Statutes, whose update included the possibility of supporting the new structures proposed and to incorporate them within the scope of the Presidency Council.<sup>3</sup>

It should be noted, however, that in order to achieve our goals, we must deepen our **sense of co-responsibility**, which our General Constitutions address. They tell us that "the brothers and sisters are co-responsible for the life of the Fraternity to which they belong, and for the OFS as the organic union of all Fraternities throughout the world."<sup>4</sup> This is essential and is an underlying factor for making appropriate changes or to improve our structures.

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<sup>1</sup> GGCC Art.70

<sup>2</sup> 2017 General Chapter Conclusions:

[https://ciofs.info/wp-content/uploads/2020/03/EN\\_Conclusive\\_Document.pdf](https://ciofs.info/wp-content/uploads/2020/03/EN_Conclusive_Document.pdf)

<sup>3</sup> These Statutes are being reviewed by the national Fraternities, in order to present it at the next General Chapter, for possible approval.

<sup>4</sup> GGCC Art. 30.1

Therefore, in this document, we will try to provide tools for each brother and sister to become aware of what it means to have “active collaboration, in accordance with each one’s situation and possible obligations for the animation of the Fraternity.”<sup>5</sup>

## 2. Central Theme for the General Chapter 2021

For our 2021 General Chapter, the CIOFS Presidency has selected the theme:

### Animate & Guide with Servant Leadership

“The nature of authority in the Order is always accompanied by the spirit of two verbs that are repeated in our Rule and in our Constitutions, **Animate and Guide**”.<sup>6</sup>

We associate these verbs, animate and guide, with the concept of leadership because, as OFS, we see leadership differently from a simple understanding of wielding power. We call it "servant leadership." It is about emphasizing and highlighting an essential way of accompanying others, where “the personality and capacity of individual brothers and sisters and of the individual Fraternities should be promoted. The plurality of expressions of the Franciscan ideal and cultural variety must be respected.” (CCGG Art. 33.1)

The OFS is a real Order. It is not only a common spiritual way for devoted people to live but also a sociological reality. Therefore, it is appropriate to talk about servant leadership. The OFS is a community, a Fraternity, which has members who need guidance and coordination, and so, it needs leaders. It has an organization, a structure that has to be managed, which often has a civil juridical personality, too. Our brothers and sisters have to be properly served in their vocational journey. We need to provide proper formation, programs and other tools to deepen their vocation and to strengthen fraternal life.

The brothers and sisters on the Councils are ‘responsible servants’ who should fulfill their duties of animation and guidance. Being responsible means that they have to know their jobs, they have to do their tasks with a certain skill and a personal capacity that makes them able to become Ministers and Councilors, and they have to live a valid Secular Franciscan spiritual life.

The advances of the contemporary world have drawn out new skills and abilities, and are eroding customs and procedures. As Secular Franciscans we, too, are attracted by those tendencies that may support our Order. Thus, we have entered the field of social media and the digital world with great force. We have seen vigorous development in the business world, and the social and economic changes that have brought about new forms of leadership. Individual workers have become the most valuable asset of organizations, and more and more attention has been paid to their well-being, and their interpersonal relationship at all levels of the organization.

Therefore, we introduce the term “servant leadership” because it clearly identifies how we, as an Order, are to “animate and guide.”

Today's leader is one who values trust, respect, and talent. Today's leader does not pursue others to do his/her service; on the contrary, he/she is at the service of the others, paying attention to the intrinsic value of the people, beyond their evident contributions, helping them to achieve even more.

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<sup>5</sup> GGCC Art. 30.2

<sup>6</sup> Benedetto Lino, *Rivista Vita Minorum* Luglio-Ottobre 4-5, Pg. 119.

Each brother and sister of the Fraternity should remember the sense of co-responsibility, which commits him/her to work as a team alongside the "servant leaders." And, the leader is responsible for encouraging this principle of co-responsibility.

Secular Franciscans have to keep in mind that whatever they do for the Order is always a fraternal service. What is explicit and expected for the Ministers and Councilors must also be the norm for all the brothers and sisters of the Fraternity: "The brothers, fleeing from all ambition, must show their love for the Fraternity with their spirit of service ..."<sup>7</sup>

### **3. Leadership in the OFS - Biblical and Franciscan Foundation**

Humans are fundamentally social beings. For them to be able to live in harmony in every society, good leadership is necessary. When God called Israel to become His people through an alliance, He gave them leaders. When Jesus Christ established the Church as the new people of God and the universal instrument of Salvation, he appointed the apostles to be leaders. The Church is structured and organized as the "Mystical Body of Christ." It has appointed or elected leaders at every level such that the mission of evangelization and charity can be well coordinated. We cannot underestimate the importance of good leadership for the Secular Franciscan Order.

There are several leadership patterns. Saint Francis chose for himself and for his spiritual family the pattern recommended by the Lord Jesus to his followers when he washed the feet of his disciples at the last Supper, and said to them: "*You call me Master and Lord, and rightly; so I am. If I, then, the Lord and Master, have washed your feet, you must wash each other's feet. I have given you an example so that you may copy what I have done to you*"<sup>8</sup>. Jesus is the model of leadership for his followers and recommends that they follow his example and cultivate a leadership different from that which is normal among non-believers, or gentiles: "*Among the gentiles it is the kings who lord it over them, and those who have authority over them are given the title Benefactor. With you this must not happen. No; the greatest among you must behave as if he were the youngest, the leader as if he were the one who serves.*"<sup>9</sup>

Here is what St. Francis established as a rule of life in his Order: "*Let the brothers who are the Ministers and servants of the others visit and admonish their brothers and humbly and charitably correct them, not commanding them anything that is against their soul and our rule.*" Again, "*Let the Ministers, moreover, receive them [brothers in difficulty] charitably and kindly and have such familiarity with them that these same brothers may speak and deal with them as masters with their servant, for so it must be that the Ministers are the servants of all the brothers.*"<sup>10</sup> Although this was the Rule of life for the First Order, it is the Gospel model handed down by Saint Francis to all his followers. We call this "servant leadership." In the OFS at all levels, the Minister exercises this model of leadership collegially (in the spirit of cooperation and collaboration) with the Council.

To be a servant-leader, in the image and likeness of Christ, the fundamental attitude of listening and discerning is essential. "*I did not come to do my will but the will of him who sent me*" (Jn 6:38). In the Church in general, and in the OFS in particular, leaders are servants of God in the first place; "*my food is to do the will of my Father.*"<sup>11</sup> Justice demands that they be

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<sup>7</sup> GGCC Art.32.2

<sup>8</sup> Jn 13:13-16

<sup>9</sup> Lk 22: 25-26

<sup>10</sup> Rb X, 1.5.

<sup>11</sup> Jn 4:34

models in the commitment to listening to God through prayer and discerning His will through dialogue, such that the Fraternity can function as one body at the service of God and humanity. As true servants, the leaders are supposed to be committed to listening to the members, especially those in difficulty. In this, their love for Christ Jesus is confirmed: “*Peter, do you love me more than these? ... pasture my lambs!*.”<sup>12</sup> Then they are to be the first in listening<sup>13</sup> to the voice of the Church that is the Body of Christ, of which the Order is a part. “*If they listened to me, they will listen to you!*”<sup>14</sup> As Seculars, the leaders should be committed in a special way to discerning the divine will in the signs of the times. “*Look at the fields; already they are white, ready for harvest!*”<sup>15</sup> In the passage quoted above from the first Rule, Saint Francis recommended that the Ministers be truly servants to the brothers, in such a way that the others could actually talk to them and treat them as such. This calls for humility.

#### 4. The nature of leadership in the OFS

One of the essential tasks of the Church is the “government function” (munus regendi), traditionally called “power.”<sup>16</sup> The current Code of Canon Law has it divided into: legislative, executive and judicial, and it is attributed to specific “ecclesiastical organs,” indicated by the proper or universal law of the Church. “Leadership” is the concrete way in which the person who holds a specific office in an ecclesiastical body, exercises this service.

The government function, depending on who performs it, can be:

- a) “**hierarchical**”: This is exercised by a “personal” body or, simply said, an individual (for example, The Superior who carries out the executive and administrative function) and by a “collegial” body (for example, the Chapter which carries out the legislative and policy function). As part of the executive function, for the validity of certain acts, the “personal” body must request the consent (binding) or opinion (non-binding) of a Council/College;
- b) “**collegial**”: This body consists of a set of offices that make up a multi-personal body or, simply said, a group of people/departments who are called upon to exercise co-responsibility and partnership.

In both cases, the style of the service is that of the “washing of the feet” proper to the “Church of the smock (the apron)”, as don Tonino Bello, OFS, and bishop said. As he put it: “power is to serve”<sup>17</sup> responsibly.

In the Church, the OFS is a public association of the faithful of an international character. It has a collegiate organizational or “government” structure. At all levels, the Chapter provides direction, and at the National and International levels, it performs legislative duties. The Council at each level performs the executive and administrative functions.

The “collegial” structure of the Council, which is meant to “animate and guide” at each level; is consistent with the nature and mission of the OFS that is highlighted in Article 21 of the Rule and explained in Articles 9.2, 31.1 and 4, 32.2, 33.1, 86.2 OFS of the General Constitutions.

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<sup>12</sup> Jn 21:15

<sup>13</sup> Cf. GGCC Art 31.3.

<sup>14</sup> Jn 15:20

<sup>15</sup> Jn 4:35

<sup>16</sup> power conferred in the interest of others

<sup>17</sup> Pope Francis 2018/10/06

Service is based on Fraternity and fraternal relationships. The “leaders” should interact with those elected to an office and coordinate with the Minister. They should pursue the common goal of animation and guidance and act in communion and community.

This function is not limited to “bureaucratic issues” nor to the execution of the “guidelines” of the Council of the higher level, but requires “prophetic creativity” for the realization of the Secular Franciscan life,<sup>18</sup> both as individuals and as Fraternity, consistent with the Gospel and the Magisterium of the Church.

Article sections 31.3 and 31.4 of General Constitutions provide the specific criteria and qualities that are necessary for those who accept to be responsible for the OFS; in short, the characteristics of “leadership.”

## I. ANALYSIS, IDENTIFICATION OF THE QUESTIONS AND CHALLENGES

### 5. Current challenges in leadership

#### *5.1 Challenges in fraternal life (in particular in local Fraternities):*

The responsibility to animate and guide our local Fraternities and the entire OFS, at its various levels, requires leadership **based in FRATERNAL SERVICE, in which we bear each other’s burdens.**

As **Christ gave his life for others**, the service of a "leader" implies renunciation, humiliation and suffering, because the brother/sister is not an object to be dominated, but a person **to be carried**; and he is a brother because he weighs down the shoulders of others.<sup>19</sup>

**Leadership provides animation and guidance for OFS Fraternities so that they can help the brothers and sisters to:**

- understand that one's plan of life must be centered on the person of Christ and in following him, rather than to set up a detailed program to be put into practice (CCGG 9.1)
- open the eyes of the soul of each brother and sister in accepting and respecting his or her being, through Jesus, the firstborn of many brothers. The whole of the brothers and sisters constitutes the **Fraternity.**
- **pray** so that you can recognize the word and the message of Jesus and know what God wishes to say to the world with your life. (GE24). To understand the responsibility of leading a Fraternity at any level requires an intense life of prayer, of intimacy with the Lord.<sup>20</sup>
- promote participation in the field of justice and public life with courageous initiatives and using one’s own life as an example.<sup>21</sup> We should not confuse public life with legitimate political options, which are personal and a matter of conscience, and less a matter for the Fraternity to discuss. If political debate is a source of division in the Fraternity, it must be avoided.
- form brothers and sisters, and share with them concrete experiences based on the second Chapter of the General Constitutions. Of special importance is conforming one's life to Christ and in our having an active presence in the world.

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<sup>18</sup> GGCC Art. 9.1

<sup>19</sup> Felice Cangelosi. Promessa e Consacrazione

<sup>20</sup> OFS Rule 8; GGCC 12.3

<sup>21</sup> OFS Rule 15

- grow within the Franciscan Family, aware that **all**, in vital and reciprocal communion, must make the charism of St. Francis present in the Church and in the world.<sup>22</sup>
- understand that the legislation of the OFS – the Rule, the Constitutions and the Statutes - help the vital and Orderly development of life in one's own Fraternity and in the communion of Fraternities which is our Order.
- participate unconditionally in the life of one's Fraternity, sharing the circumstances of one's own life, helping the brothers and sisters to distinguish between "not being able to participate" in the life of the Fraternity and "not wanting to participate" or being too lazy to participate.
- implement with serene acceptance, humility and "obedience," the decisions in particular of the General Chapters, which are the highest expression of responsibility of our Order. This may seem difficult as in, for example, the policy on not wearing a friar-style habit.

## ***5.2 Challenges in Councils at various levels:***

### **5.2.1 Formation**

**Formation continues to be the first challenge for our Order** and, in order to exercise the function of leadership, it is fundamental that it emphasize, for the sake of the future of the Order, **a formation on being**.

The priority of **being** over **doing** is strongly reaffirmed in Article 100.3 of the General Constitutions.<sup>23</sup>

By simply emphasizing **doing** - activism - **without being**, our Order, our brothers and sisters, will not mature and we will gradually end up with a simple and boring routine. For this reason, the Secular Franciscan Order is counting on formation for its future: **not only in an intellectual and scholastic formation, but also in a vital formation of adherence of the heart to the Gospel<sup>24</sup>, to our Rule, to our Fraternity, to our brothers and sisters**. A good person in charge must exercise his/her ability to guide like Jesus, expressing himself/herself in such a way that even the little ones, the simple, the illiterate ... understand it and hopefully advance towards the Kingdom. Thus, **brothers or sisters with little or no education can be received into the OFS if they are formed well and adhere to the spirituality of Francis of Assisi**.

The Council of the Local Fraternity has to ensure an adequate formation of new members and respect the times established for Profession in the General Constitutions and in its own national statutes. Those who do not know the Rule cannot be admitted to Profession.

In the local Fraternity the Council and the brothers and the sisters must take into account that:

- to be elected to service it is necessary to know and be familiar with the Rule and the General Constitutions;
- leaders and those in charge must be aware that they must have (and make available) the time to carry out their service;

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<sup>22</sup> OFS Rule 1

<sup>23</sup> Fidelity to their own charism, Franciscan and secular, and the witness of building Fraternity sincerely and openly are their principal services to the Church, which is the community of love. They should be recognized in it by their "being", from which their mission springs.

<sup>24</sup> "I give praise to you, Father, Lord of heaven and earth, for although you have hidden these things from the wise and the learned you have revealed them to the childlike." (Mt. 11:25)

- Fraternity meetings respond to the needs of its members, paying special attention to allowing participation in the life of the local Fraternity;<sup>25</sup>
- brothers and sisters should participate in Fraternity meetings: it is useless to have a large number of members if they do not integrate actively in the life of the Fraternity.<sup>26</sup>
- they need to maintain dialogue with the brothers and sisters, and care for and engage non-compliant members.
- they give due importance to Article 50.1 of the General Constitutions for the development of the life of the Fraternity, its presence in the world and the adoption of courageous measures in the apostolic field.

### 5.2.2 The nature and addition of regional Fraternities

The Secular Franciscan Order is a "*Fraternity of Fraternities*" spread all over the world. The Constitutions define it as "*the organic union of all Catholic Fraternities ...*"<sup>27</sup> "... *which is divided into Fraternities at various levels: local, regional, national and international ...*"<sup>28</sup>

When a national Fraternity has a large number of local Fraternities and has difficulty in the animation and guidance of these Fraternities, regional Fraternities could be established. Before establishing regional Fraternities, the National Council must determine if such an action is truly necessary. The Constitutions provide several reasons for the existence of regional Fraternities:

- Local Fraternities existing in a territory comprise a natural entity;
- Geographic proximity which facilitates coordination and guidance;
- Fraternities having common problems;
- Pastoral realities.

National statutes must regulate the *existence* of regional Fraternities according to the norms of the General Constitutions.

### 5.2.3 Communication

Communication, essential for life today, must be oriented towards a vital communion among all the brothers and sisters, among all the Fraternities and, consequently, must be a priority for the Councils.

- It is necessary to make a great effort to facilitate communication. Lack of communication is a serious flaw in our Order that inhibits fraternal life among the brothers and sisters. The leaders of the local Fraternities have a great responsibility to ensure that information that facilitates communion between the various levels of the Order circulate in a harmonious and natural way.
- The General Chapter of 2017 dealt extensively with the theme of communication, stating that it plays a fundamental role in the organization, both internally and externally. Effective communication is essential for building and maintaining relationships within our Order. Though with a prudent and wise approach, but it is necessary to consider the use of the social networks and contemporary means of communication, which is not limited to a certain geographic territory, and therefore it

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<sup>25</sup> GGCC Arts. 31.4; 32.3

<sup>26</sup> GGCC Arts. 30,2; 53,1-2-3

<sup>27</sup> GGCC Art. 1.3

<sup>28</sup> GGCC Art. 1.5

is opened to everyone. The Chapter approved a document to improve communication that would support growth of the Order, guarantee transparency and build mutual trust.

#### **5.2.4 Challenges in legislation (statutes)**

The OFS is governed by the universal law of the Church and by its proper law<sup>29</sup>.

The national statutes must provide the specific criteria for the organization of the OFS<sup>30</sup> which is to be adapted to individual national realities concerning fraternal life. These are specifically stated in the General Constitutions (which apply the Rule and Article 4.2 GGCC), addressing both a spiritual and legislative point of view. Furthermore, they should be written in a civilly valid form; i.e., in compliance with state laws, so that they can also comply with civil regulations.

The statutes can NEVER modify the general principles described in the Rule, nor the structure and organization, including the form of "government," established in the General Constitutions.

Not all constituted and/or emerging national Fraternities have their own statutes; some have not updated them; and in some cases, the existing statutes are so outdated that it does not carry out its purpose. It appears that the entire document is almost never reviewed in the light of the experience gained over time or the guidelines issued by the Presidency.

Statutes are necessary. They should be suited to one's national reality as an aid to fraternal life, and should be adapted to the evolution of the Fraternity or to the maturing of experience, to better guide and animate. For this reason, it should be easily modifiable. Few statutes fulfill this requirement.

#### **5.2.5 Administration and financial data**

Compliance with the provisions of Articles 52.4; 62.2 f) and j); 66.2 k) and l); 74.2 j) and k) of the General Constitutions is essential, regarding the responsibility of the Council and the Treasurer in the economic administration of the Fraternity at any level.

- The Statutes of each level must clearly define how the financial management of the Fraternity is to be carried out.
- The Council of each level must administer its own patrimony (assets) according to the directives of the Chapter, which must approve the financial report and the budget every year and especially on the occasion of the elective Chapter. If the Council does not adhere to these regulations, the President of the elections must decide if the situation is suitable for celebrating the Chapter. Also, it must be in compliance with the laws of the State on ecclesiastic entities and/or if the Fraternity has a juridical personality (legal entity).

#### **5.2.6 Challenges of leadership in YouFra**

Franciscan Youth (YouFra) is organized in a specific way; it has its own methods of formation and teaching which are appropriate for the needs of the world's youth, based on the present realities in the various countries (GGCC 96.5). This organization has a structure that has strong connections with the OFS, but is autonomous. Due to this, YouFra also has challenges in leadership but they are uniquely different from those of the OFS.

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<sup>29</sup> GGCC Arts. 4.1 and 6

<sup>30</sup> GGCC Art. 29.3

One major challenge is the **lack of members with double belonging (belonging both to YouFra and the OFS)**. “All leaders of Franciscan Youth at the international level and at least two members of the national Council of the Franciscan Youth are to be **professed** Secular Franciscan youth.” (GGCC 97.3) However, at past YouFra assemblies and OFS elective Chapters we had to face the challenge of the lack of brothers and sisters who simultaneously belong to the OFS and YouFra. In some YouFra National Fraternities profession to the OFS automatically means that they no longer belong to YouFra.

The second challenge is the **low number of members who are ready to serve as leaders on the international level**. This – together with the other necessary criteria -- makes it difficult to find those eligible AND ready to become servant leaders of YouFra on the international level.

The minimum and maximum age for belonging to YouFra encompasses only a few years. (Note, in some National Fraternities the age for admission to YouFra may differ.) This period of time for young people is a time of major changes: changing schools, starting to work, starting to have relationships, getting married, moving away from home. Many times, these changes happen very quickly, which has an impact also on the length of time they belong to YouFra. All these together result in a **constant transition of the members** in the Fraternities. Belonging to a YouFra Fraternity for only a few years limits our ability to find good leaders who have experiences in fraternal life and who have skills in guiding and animating the Fraternities.

The OFS has to examine the ways in which we can help YouFra to face and cope with these challenges, and to identify and recognize the responsibilities and duties of the OFS itself toward YouFra.

### **5.2.7 Objective challenges**

We also have to deal with challenges that do not have their roots in the operation of the Councils nor in the weakness of individuals.

The first challenge is the question of **geography**. Some national Fraternities are spread in a large area of a country with vast distances between the local – or even regional – Fraternities. In spite of the tools of communication of these modern times, it is very difficult to maintain real fraternal bonds, to organize personal encounters and meetings – either for the Councils or for the Fraternities themselves. Even though, in some cases, the local Fraternities or regional Fraternities are able to come together, the brothers and sisters live in remote areas, which means that maintaining fraternal contacts, celebrating Chapters or organizing fraternal and pastoral visits are big challenges -- if not impossible in some cases. To provide spiritual assistance to them is also a big challenge.

**The size of the national Fraternity or that of a local Fraternity** can also be a challenge in how to guide and animate it. Two questions must be raised:

1. How does a National Council serve a National Fraternity which has large numbers? This often means there may be many regional Fraternities and many local Fraternities. This makes it difficult to establish a good structure with a reasonable number of Fraternities for each regional Fraternity. The issue here is to ensure that the National and Regional Councils are able to focus on the vocational journey and the spiritual life of the members ... and NOT on resolving technical problems and trying to cope with the challenges of organization and communication.

2. How do we guide and animate a local Fraternity which has a huge number of members? Here, we risk losing personal contacts, and forget about real fraternal life because we may be stressing on how to organize the life of a large number of Secular Franciscans in the same local Fraternity. We often seek structural and organizational solutions instead of courageous decisions which may require that we request that the responsible major superiors establish new and smaller local Fraternities. There is the danger that we focus more on the structure than on growing in the fraternal spirit.

In both of these cases, the priorities must remain: fraternal life, personal contacts, fraternal sharing among the members, seeking God's will within the Fraternity.

The third challenge is when there is a big difference among the various Fraternities (not only the national, but also local Fraternities) in terms of number of the members. **An unbalanced structure** is always more difficult to be guided and animated than a good, balanced one. The larger Fraternities seem to require more attention and more care, while the small ones may believe they are forgotten. It is very difficult to give general guidelines when the differences among the Fraternities in terms of size is so striking. Councils must always be very careful to avoid the temptation to justify, discern and provide service only according to the numbers/size of the Fraternity.

One other challenge is that of cultural or language diversity within an individual Fraternity and among the Fraternities of a region. Councils need to appreciate such diversity, but must also be attentive to these differences and how they can provide formation and a true sense of belonging and communion among all members.

## **6. What is the current understanding of leadership?**

Depending on the area and culture, many different words are being used for "leadership." That is true even in our common language in the Order where we use such words as: service, management, leadership, guidance. Do they have different meanings or are they synonymous? If we accept that these are not the same and they are used in different contexts, we can move closer to gaining a greater common understanding of the word "leadership" so that we can use it more properly, especially in the context of "servant leadership;" that is, the kind of guidance and animation described in our Rule and General Constitutions.

If we understand it properly, then the kind of servant leadership the OFS needs will be modeled by those who guide and animate the Fraternities on the various levels. Thus, we can avoid misunderstandings and mistakes, like relinquishing the leadership role to the spiritual assistants (as if they were spiritual directors) or removing Councilors from the Fraternities if they were serving at another level of the Order.

We note that in many Fraternities core values are missing, and this lack of core values makes the service of the Councils very difficult. This lack includes: ignorance of Christian and/or Franciscan values, lack of understanding of Franciscan spirituality, and sometimes, even lack of the human virtues necessary to be a good servant leader.

In addition, it is a fact that collegiality (that spirit of companionship and collaboration) is not always a part of the ideas about guidance and animation. Personal leadership is replacing the idea of the proper work of the Council, and decisions are being made by the Minister instead of the entire Council. This is based upon a wrong understanding of leadership, and it raises the question how a Council works. Is it as a body serving the Fraternity? Or a group of individual persons in charge?

## II. ROOTS AND REASONS FOR THE PROBLEMS AND CHALLENGES

### 7. Fundamental problems

One of the most important, if not the most important, and most fundamental problem, is the **wrong understanding of leadership**, and thus the misunderstanding of the role of the leaders. There are two wrong approaches, which can even result in an extremist attitude.

One wrong approach is that the animation and guidance of the Fraternity is only a pious service. This includes the idea that the Minister and the Council members are only servants who “only” have to pray and execute the decisions of the Chapters and the Councils, to the letter. They do not believe they have the responsibility to be creative, to suggest new ideas. “As I am a servant, you tell me, what I shall do” can often be heard, mostly in the local Fraternities.

The other wrong approach is the opposite of the above. Here, the Minister and the Council members are leaders that behave as bosses. They take the initiative, decide everything, convinced that everything they do is correct and good. They take the attitude that “I am the Minister, so I have to tell you what and how to do it.”

Neither the first, nor the second, is faithful to the kind of service required in animating and guiding the Order and for Secular Franciscan spirituality. Those who serve the Fraternities have to be men and women of prayer, always seeking the will of God, with the intention of seeking the good of the brothers and sisters and that of the entire OFS.

Many times, there is a **lack of capable persons**. Sometimes this means that due to the low number of brothers and sisters, it seems that God has not sent anyone capable to be in charge of a Fraternity. Other times, however, the problem is that the capable brothers and sisters are not visible, either because they are ‘hiding their talents’, or because they are engaged in other commitments. Some reasons for this are acceptable, for example, they have family or work responsibilities; but some are unacceptable, for example, they are involved in other spiritual movements, or they are seeking personal success in other areas. Such activities keep them from accepting offices in the Order which would require them to be responsible for the Fraternity.

In connection with this previous problem, we have to raise the question of whether those attending **elective Chapters are sufficiently prepared**. It often happens that there are not enough candidates, or literally no candidates, and the brothers and sisters are not being asked before the Chapter begins about their readiness and preparedness to serve. Also related to this is the fact that the capitulars themselves are oftentimes unprepared. Moreover, we have the sad experience of those who participate irresponsibly because of lack of attention, not having read the documents, or they have no interest in the candidates or those nominated from the floor.

We ask: Do all the capitulars really know and understand the General Constitutions and other regulations regarding the role of the Minister and the Councilors, and the process of elections? Are they familiar with these regulations? Sometimes, candidates who have already accepted nomination, and sometimes even the presider of the Chapter, are unaware of these regulations or have very limited knowledge and understanding.

As it is written above, leadership in the OFS is a shared leadership. Decisions are to be made in the Councils. Personal decisions made by the Ministers and Councilors should be very limited. The responsibility for animating and guiding belongs to the members of the Council; and the one who is primarily responsible is the Minister. It is important to understand that there is NO shared responsibility. The Council makes the decisions and names the **person responsible** for that certain decision. Problems can develop and can harm the successful functioning of the Council if we are not clear about the individual(s) responsible for a certain decision.

Sometimes, there are **conflicts within the Councils**, which unfortunately, many times, are not resolved. Such unresolved personal conflicts on the Councils block the work, and often suspend even the operation of the Council. Without true dialogue and an eventual necessary reconciliation, the Council cannot continue to serve the Fraternity properly.

There is often a misunderstanding about the role of the Vice-Minister. He/she assists the Minister and is never merely a substitute for the Minister. Please note: the relationship between the Minister and the Vice-Minister is very important.

## **8. General, but not fundamental problems**

There are other general problems that are not at the core of the question; however, it is essential to talk about them in order to understand how to best serve the Fraternities especially as leaders.

How to guide and animate a Fraternity is a topic that is often not addressed in formation. Therefore, the result is that there is a **general lack of knowledge about how to serve as a leader**. Formation materials and discussions on the subject are often not addressed. Brothers and sisters who are on the Councils or who become Council members may not be properly formed.

Those who are in charge in the Councils on the various levels usually have a very strong sense of service. This is a good sign of the fraternal attitude. Many Councils and Ministers have excellent ideas about fraternal life, and about the future of the Fraternities, so they develop plans. This can help Fraternities move forward on the vocational journey in a hopeful way. However, many times, the Councils and Ministers are simply “following” the life of the Fraternities, trying only to resolve the questions and problems emerging, but **without having a plan for the future**. We should always seek new ways that help the development of the Fraternities and the spiritual life of the brothers and sisters, being open to and responding to the signs of the times.

The social and cultural context in which the Fraternities of the different levels live their fraternal life is very different in the various parts of the world. We need to consider traditions, education, economy, and others. This could mean **different approaches on how the Councils serve**. Generally, however, there is a **lack of awareness (and thus, a lack of sharing) of ways and techniques** that could help the work of the Councils and the Ministers. Such approaches could include offering workshops, brainstorming, delegating jobs/tasks, supporting commissions, incorporating working groups, etc.

In line with this, the general approach to service and leadership according to the different cultures may also be very different. The nature of the different societies is often reflected in the Councils who may have unique ways of guiding and animating. A challenging factor in

how the Councils work is also the fact that some Fraternities have government limitations which threaten their freedom so they cannot openly live their Franciscan charism.

## 9. Some concrete problems

Some **personality traits** lead to greater leadership performance and effectiveness, while others may lead to ineffectiveness. Being responsible in the OFS must be considered as a **service** and not a position of power. The choice of the person for any responsibility should be based on criteria that will lead to the good of the Fraternity at any level. These criteria should be based on the characteristics in **the personality** and in **the behavior** of this person who, first, must be a leader able to communicate, collaborate, to have consistent contact with others, and to build a trusting relationship. He/she should be open to all opinions and should be able to set goals and to look ahead. All these traits should be implemented while using his/her **own communication style** (This is why it is better not to compare a new leader with the previous one). The future of the Fraternity depends on the vision that a leader has and how effective he/she can be in making decisions: it is not about ordering but rather about consulting with the team or Council which together are filled with wisdom and inspiration of the Holy Spirit.

However, difficulties may develop and lead to the inability to continue to take responsibility. This may be due to a **lack of experience**, especially when he/she doesn't know how to let the Fraternity grow or how to solve problems or how to assign tasks and responsibilities to others. The leader is not the one who is supposed to do everything but the one who should assign tasks to the appropriate person and then follow up accordingly. In observing the results of elections many tasks fall to the same person who is re-elected repeatedly. The years of experience can either mean a lack of creativity and evolution, or can guarantee that we maintain the authenticity of the identity of the Order. Let the Holy Spirit guide and inspire us for the good of the Order.

As the OFS, each YouFra Fraternity around the world has its own reality shaped by political, social, economic, religious and cultural circumstances. Moreover, these circumstances cause challenges for YouFra Fraternities, which also affect the OFS Fraternities. These include:

- **the lack of new vocations**, that is, young people interested in following the teachings of the Catholic Church and the example of St. Francis, especially in more developed countries of Western Europe and North America, as well as in countries where Catholicism is a minority.
- **inadequate or lack of relationship with the spiritual assistants and the OFS**. The relationship with the spiritual assistants and the OFS depends also on naming suitable persons for these services. Superiors and responsible persons should invest more attention and love in the formation of all people concerned.
- **a lack of simultaneous belonging to the OFS and YouFra**. YouFra, as a group of young people between the ages of 14 and 30, requires much care **because of its personal dynamic**. It is a time in a person's life when changes happen rather quickly, and thus it is more difficult to achieve stability in the functioning of a Fraternity and in formation.

## III. PROPOSALS, IDEAS, SUGGESTIONS, SOLUTIONS

For this section, please refer to Article 50 of the General Constitutions where points 1 and 2 specify Council tasks. Also refer to the 2014 General Chapter where the central theme proposed these points which have not been thoroughly developed yet.

## **10. Maintaining continuity of service from one Council to the next**

The transition from an outgoing Council to the newly elected one should take place with more than just one joint meeting. We need to allow an adequate and proper transfer of information. The old Council should provide the reasons why certain choices have been made, why certain paths have been developed and why the goals set have or have not been reached. The outgoing Council report must therefore focus less on what has been done but more on the reasons, on the vision that the Council has tried to develop based on the Chapter's decisions. An important point to address is evaluating how the outgoing Council has given continuity to the work of the previous one, or if, as it unfortunately happens, this continuity was missing. In the case of the latter, it is necessary to explain the reasons. It is also necessary to evaluate if the vision and the related mission proposed by the Council were shared by the Fraternity or if, instead, they were the dream of just the few. The evaluation of leaders can be based on this point.

## **11. The evaluation of servant leaders**

Servant leaders do not necessarily have to be charismatic leaders. Indeed, most of the time, the charismatic leader's presence may be counterproductive because he/she may take responsibility for everything. This risks the principle of collegiality where the spirit of companionship and collaboration is lost, where service as a Council is undermined. The Council and the leaders are at the service of the Fraternity members and are their soul. In evaluating their work, we must consider how much they have been able to involve the Fraternity and helped it progress by supporting our brothers and sisters on this journey rather than taking full control of the situation. We should clearly define the role of the leader as the individual and the role of the Council.

Some criteria are and things to remember when considering or evaluating a servant leader:

- In the Franciscan world, the principle of rotation of members as leaders is a fundamental one. Therefore, this is a service which is temporary in nature.
- He/she is not simply a guide but the one who accompanies.
- He/she must have a vision consistent with that of the Fraternity (the vision must reflect the Form of Life proposed by the Rule which covers a wide range of possibilities).
- He/she must clarify and address the needs of the territory and propose concrete actions in response to them.
- He/she must be productive: attracting new vocations and helping people to grow so that they can take over the leadership of the Fraternity.
- He/she must develop a sense of belonging among the members and make it clear that the OFS is an Order in the Church and that its journey does not depend on the First Order.
- He/she should have the ability to involve, delegate, and inform in order to generate mature and trained people who fully live their vocation and their profession.

## **12. Formation of Servant Leaders**

The formation of the leader is extremely important and must be addressed with greater depth. For this purpose, courses developed by the CIOFS Presidency could be used. It would also be appropriate to consider formation proposals from other sources. It is a matter of choosing ones that are appropriate to the unique needs of countries and cultures. The courses organized by the CIOFS Presidency could be implemented, using today's technology (video conferences or correspondence courses). These courses should provide a common base for all the members

of the Order and should be EXTENDED over a period of time (and not be limited to a short lesson) with homework and study dossiers. The development of this formation should not be delegated to local responsibility but should be standardized based on a program developed by the CIOFS Presidency and implemented at the Regional level for local leaders and at National level for the Regional ones. This would maintain the sense of being and belonging to the Order.

To properly respond to the need for promoting people able to take over leadership, we should keep in mind that it is necessary to review Initial Formation programs and to ensure that Part III of the Rule, the one that deals with life in Fraternity, is properly addressed. This section, unfortunately, does not always receive enough attention.

The role of leadership, especially servant leadership, should be discussed thoroughly in initial formation as the candidates discern their vocation and visualize better their possible roles in the Order. Initial formation should help the candidates develop a clear understanding of what it means to be co-responsible for the Fraternity and for the brothers and sisters. The Council should take the time to evaluate each candidate, considering the possibility of leadership roles and the characteristics necessary. In addition, both the candidate and the Council should address work commitments, family responsibilities, etc. in determining how the new candidate can serve the Order. As always, the personal journey will help the candidate develop a deeper sensitivity and understanding and a sense of responsibility towards the Fraternity.

### **13. Finding suitable servant leaders**

One of the duties of the Councils is to identify suitable persons for possible leadership roles. During their initial formation, the Council should consider inviting candidates to get involved in Fraternity life. Service is, of course, a voluntary one. In the Franciscan world, volunteering and generosity are part of the Charism. Therefore, they should understand that making oneself available to this service is part of living the Charism. Involvement must take place through participation in Fraternity life, in its commissions and committees, with roles and responsibilities growing, little by little. Through good formation and formators who are passionate and joyful about Francis and the Order, they too will become passionate about Fraternity life. They will "fall in love," not with words but with direct commitment and with the understanding of Fraternity life at the local, regional, national and International level.

It is important to emphasize the importance of rotating the roles of members in the Fraternity. It is a lesson in detachment, to being a *useless servant*. It also helps ensure continuity to the path that the Fraternity is carrying out (ref: A Rule for Hermitages first part FF?? 136). By rotating the members in positions of leadership, they become more engaged and better understand the Order, its mission and its spirituality. They feel *empowered to serve* in a more active and productive way. Their commitment is renewed and refreshed. It is important to develop that sense of leadership among the secular members of the Councils because, as already noted, they often mistakenly relinquish this role to the Spiritual Assistants (legacy of the old Rule). The role of the Spiritual Assistants must be thoroughly clarified, understood and respected.

### **14. Strengthening fraternal relationships within the Councils**

The relationship among the Council members and specifically between the Minister and the Vice-Minister, was addressed as a central theme of the General Chapter of 2014. This is a very sensitive issue. It is also important to analyze the role of the Spiritual Assistant which is

not always clear and which can lead to misunderstandings/overlapping of responsibilities. We ask: Who takes the lead on critical issues in both personal and institutional relationships? Who takes the lead on spiritual issues and questions? Management and Fraternity life do not rest exclusively on the shoulder of the Minister or of the Council (see the General Chapter 2014, the General Constitutions and the Rule). In fact, everyone in the Fraternity is responsible, and, therefore, all must collaborate in the fraternal spirit of Service.

### **15. Some possible ways to help YouFra**

The relationship between OFS and YouFra is very special and the conversation with YouFra about leadership should be considered of great importance. YouFra's input is appropriate on this topic. It is also essential that those OFS elected to the Council at any level should read and study the documents relating to YouFra and, above all, should value the presence of the YouFra delegate on the OFS Council. Similarly, the Fraternal Animator should be valued on the YouFra Council. These delegates should receive specific formation. They should assume the role of "consultant," that is, one who remains behind the scenes, who does not impose himself or herself into the daily actions of the Council. In practice, this is someone who has authority but is not authoritarian. The Fraternal Animator who represents the OFS should appreciate the initiatives of the YouFra Councils and express fraternal love and attention. In times of difficulty, the Fraternal Animator should support them without hovering or controlling their actions. This, of course, does not necessarily mean always saying 'yes.' When mistakes are made, criticism must be constructive. They are at the same table and patiently and attentively help to analyze the problem, respecting opinions, accepting them and enthusiastically supporting what has been decided.

## **CONCLUSION**

### **16. Some questions to be discussed**

This document raises some key questions, but there may be others which you may wish to raise and discuss. In preparation for the General Chapter, prepare a response to the questions raised below, and, if you wish, prepare a list of your own questions and how you might answer them, basing them on your cultural and unique experience. If possible, please involve your Fraternities at all levels in this discussion. **Please submit your responses, indicating your very concrete proposals in a concise form, not longer than 2 (two) pages, by e-mail by 2021. March 31<sup>st</sup>.**

1. What kinds of general and fundamental problems are we experiencing in our Fraternities today? (Here, you may want to address the unique circumstances we need to address because of how the pandemic has changed how we live and conduct our Franciscan lives and apostolic work.)
  - a. What are the major problems?
  - b. Have we addressed any of these problems in this document? Are there other kinds of basic problems that need to be addressed?
  - c. What is your response or suggestion on how these problems might be addressed in your cultural context?
2. What is the experience of our National Councils about how we are addressing the issue of good servant leadership?
  - a. Does the formation plan include this topic? If not, should we include servant leadership in our plan? Why?
  - b. Is there a specific formation on servant leadership for those on the Councils? How can we address this concern?

3. According to you, which are the fundamental points on which to evaluate the service of a Council?
4. Which items (or points) are important to develop in a course aimed at preparing leaders who are capable of answering the needs of the times so that they can present and propose Franciscan values lived as Seculars?
5. Based on your experience, is it appropriate for us to get involved with civil society and non-governmental organizations (NGOs) in order to work together to support and promote our values?
6. How do you feel about the rotation of offices and leadership so that our leaders do not serve more than two or three terms in any office?
7. What should YouFra expect from the OFS delegate or the Fraternal animator? Which kind of formation can YouFra propose for them?
8. What tools, programs or actions do you suggest that CIOFS consider to help you in addressing the above problems?
9. In general terms, what is the motivation of a Secular Franciscan servant leader?

## **17. Possible directions**

### ***17.1 Decisions***

Based upon the reflections/responses coming from the National Fraternities, the Presidency will prepare a suggested action plan for the future. It will be presented as a proposal at the General Chapter where the International Councilors from around the world and the Presidency will come together to form the International Council. It is the right and duty of the International Council, as a body, to establish the guidelines and directions for the Order and the Presidency for the next three years. Therefore, it is of paramount importance to be well prepared so that good on-site work at the Chapter will make it possible to establish priorities, make the necessary decisions, to determine the necessary projects, and to develop timelines. These guidelines will help the next CIOFS Presidency to animate and guide the Order until the International Council meets again three years later.

Each National Fraternity should work on this document, always seeking God's plan and will, so that the entire Order will be able to help the brothers and sisters more on their vocational journey into personal holiness. With your thorough preparation, including, if possible, asking input from the Councils at all the levels, the International Council at the General Chapter will be able to better animate and guide the Fraternities, for the greater glory of God, making it possible for all the Fraternities and each individual sister and brother to receive from God...

**...peace and good.**

Rome, 2020, August 31<sup>st</sup>

The CIOFS Presidency