



3. History and Development of TOR Rule

II. Acceptance into This Life

4. **T**hose who through the Lord's inspiration come to us wanting to accept this way of life are to be received kindly. At the appropriate time, they will be presented to the ministers who hold power in the fraternity (Test 1; ER 2:1-3; LR 2:1; FLCI 2:1).

5. The ministers shall ascertain that the aspirants truly adhere to the Catholic faith and the Church's sacramental life. If the aspirants are found fitting, they are to be initiated into the life of the fraternity. Let everything pertaining to this gospel way of life be diligently explained to them, especially these words of the Lord: If you want to be perfect, go and sell all your possessions and give to the poor (Mt 19:21; Lk 18:22). You will have treasure in heaven. Then come, follow me. And if anyone wants to come after me, one must deny oneself, take up one's cross and follow me (Mt 16:24; LR 2:2-6; FLCI 2:2-4; ER 1:1-3).

6. Led by God, let them begin a life of penance, conscious that all of us must be continuously converted. As a sign of their conversion and consecration to gospel life, they are to clothe themselves plainly and to live in simplicity (ER 2:14).

7. When their initial formation is completed, they are to be received into obedience promising to observe this life and rule always (LR 2:11; FLCI 2:8). Let them put aside all preoccupations and worries. Let them only be concerned to serve, love, honor, and adore God, as best they can, with a single heart and a pure mind (ER 22:26; Adm 16).

8. Within themselves, let them always make a home and dwelling place for the one who is Lord God almighty, Father and Son and Holy Spirit (ER 22:27; 1LtF 5-10; 2LtF 48-53) so that, with undivided hearts, they may grow in universal love by continually turning to God and to neighbor (Jn 14:23).

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TAB 3

History and Development of the 1982 TOR Rule



Paul McMullen TOR
“The Development of the New Third Order Regular Rule”

Study Guide:
“The Evolution of the Rule of the Third Order Regular”
Kathleen Moffatt OSF

Margaret Carney OSF, Suzanne Kush CSSF,
Jean François Godet-Calogeras, Ph.D., eds.
“Introduction” to the
History of the Third Order Regular Rule: A Source Book

Study Guide:
“The Rule Project: *Metanoia and Mercy*”
Kathleen Moffatt OSF

Roland Faley TOR
“Genesis . . . The 1982 Rule — A Personal Remembrance”

9. THE DEVELOPMENT OF THE NEW THIRD ORDER REGULAR RULE

INTRODUCTION

The Vatican II Decree on the Up-to-Date Renewal of Religious Life stated that:

...renewal of the religious life comprises both a constant return to the sources of the whole of the Christian life and to the primitive inspiration of the institutes, and their adaptation to the changed conditions of our time. The Gospel must be taken by all institutes as the supreme rule. The spirit and aim of each founder should be faithfully accepted and retained, as indeed should each institute's sound traditions, for all of these constitute the patrimony of an institute. Institutes should see to it that their members have a proper understanding of men, of the conditions of the times and of the needs of the Church.¹

The Church's call to renewal has been answered by the Congregations of the Third Order Regular of St. Francis in various ways and at various times in recent years. Their most notable and historic response was the writing of the new Rule for the TOR, which received papal approval. Let us now look at how this renewal process took place.

Brief History of the Franciscan Tertiary Interobediential Congresses

In 1950, at the invitation of Fr. John Boccella, TOR, Minister General of the Third Order Regular, the first Franciscan Tertiary Interobediential Congress took place in Rome. The purpose of this meeting was to consider the possibility of forming a confederation of the male Congregations professing the Rule of the TOR. This meeting also served as an opportunity for the Superiors General of the Tertiary Congregations present to become acquainted with each other and to know and appreciate the work being done by the various Congregations.

The Congress was held in 1955. Among the ideas discussed at this meeting were: the exchange of personnel among the various groups, the feasibility of a common liturgical calendar, and having the Procurator General of the TOR represent the Tertiary Congregations to the Holy See.

In 1961 a third Congress was held. At this meeting a study was made of the various ways of mutual collaboration. A Secretariat for the organization was established.²

A national meeting of Tertiary Congregations of men with houses in the US was held at St. Francis College, Loretto, Pennsylvania in 1962. The main theme of this meeting was education; a major apostolate of those in attendance.

The various Congresses and meetings of the Franciscan Tertiary Congregations of men served to make all aware of the existence and ministries of one another. Some collaborative efforts resulted:

¹Austin Flannery, OP, ed., "Perfectae Caritatis", n.2, *Vatican Council II, The Conciliar and Post Conciliar Documents* (New York: Costello Publishing Co., Inc., 1975), p.612.

²Eight male Tertiary Congregations were represented at the first Congress, seven at the second and eight at the third. In 1966, twelve Congregations were considered part of the Interobediential Congress; information was known about several others. A directory was published in 1968.

in some instances, TOR priests acted as chaplains for groups of brothers; brothers helped the TOR's in mission areas in India and South America.

Preparations for the Madrid Meeting

In 1972, Fr. Louis Secondo, TOR, Minister General, wrote to those congregations who had participated in the previous Congresses, asking them if they would be willing to participate in another meeting. Upon receiving a favorable response, preparations began for the Fourth Franciscan Tertiary Interobediential Congress.

Early in 1973 Fr. Roland Faley, TOR, and Fr. Thaddeus Horgan, SA, had several conversations about the possibility of revising the Rule of the TOR. Over a period of several months they wrote an initial document. This document was presented to the delegates attending the first preparatory commission meeting in the spring of 1973. At this meeting it was decided that the Congress would be concerned with the formulation of a revised Rule; as well as the history of the Penitential movement, and Francis' relationship to it.³

After this meeting, letters were sent to the Superiors General of 16 male Franciscan Tertiary Congregations, inviting them to the fourth Congress, scheduled for Madrid in April, 1974. The principal item on the agenda would be the revision of the TOR Rule. A copy of the proposed draft and commentary was enclosed. They were asked to submit their comments and suggestions.

A second commission meeting was held in January, 1974. Reports from various Congregations indicated that much more education was needed on the historical origins of the Franciscan Penitents, as well as our particular identity, history and spirituality. The earlier draft was revised and plans were finalized for Madrid. In addition to the Superiors General of all known male Tertiary Congregations, an invitation was extended to the various Conferences of Tertiary Sisters and to the Anglican Franciscans. The revised draft was sent to all those invited to the Congress.

Fourth Franciscan Tertiary Interobediential Congress

This meeting was held in Madrid in April, 1974. In attendance were representatives of Franciscan Tertiary male Congregations, Sisters' Federations, the Anglican Franciscans, and the preparatory commission.⁴ Papers were presented with important information on the early history of the Franciscan penitential movement, the various TOR Rules, biblical insights on conversion, and the Order today.

The papers and the proposed draft of the Rule were discussed at great length. All agreed that there was need for a new Rule, expressing our Franciscan Tertiary charism of penance as metanoia, or Gospel conversion. The proposed draft was modified and became a study document entitled A Statement of Understanding of Franciscan Penitential Life. This document, along with the papers presented at the Congress, was translated into English, Italian, Spanish and German. Copies in the appropriate language were sent to the Superiors General and Sisters' Federations for distribution to members of their organizations. A process of education was seen as essential for Tertiary Franciscans, in light of new historical research and biblical study. Bro. Paul McMullen, TOR, was elected secretary of the Congress to oversee the above mentioned translations and distribution of materials.

³Fr. Roland Faley, TOR was elected president of the Preparatory Commission; Bro. Paul McMullen, TOR as secretary.

⁴The Superior General or Delegate from ten male Tertiary Congregations attended; six Sisters' Conferences were represented.

Holy See informed

At the close of the first commission meeting, the members met with Archbishop Mayer, secretary of the Sacred Congregation for Religious (SCRIS) to explain the work being done towards eventual revision of the TOR Rule. After their second meeting, a progress report was sent to SCRIS, informing them of plans for the Fourth Interobediential Congress.

Fr. Basil Heiser, OFM Conv., sub-secretary of SCRIS, attended the final session of the Madrid meeting. He called the Congress "a praiseworthy effort at renewal of religious life." Noting the history and background of the Rule of 1927, he felt that the Holy See would look favorably on a revised Rule. Fr. Basil added that no new Rule would be imposed on any Community which felt it could not receive it.

Distribution

Copies of the Madrid Statement were sent to all the friars of the Third Order Regular. In an accompanying letter, Fr. Louis Secondo said that this Statement

...expresses our basic purpose and understanding of ourselves as members of the Order of Penance within the Church in the world of today. It is to be considered as a position paper, an interim step towards a new Rule.⁵

The papers presented and the proceedings of the Madrid Congress were translated into English, Italian, Spanish and German and published as a special issue of the *Analecta, T.O.R.*, Vol. XIII, n.123, 1974. A Study Guide to the Madrid Statement was printed and distributed through the Federation of Franciscan Sisters of the USA.⁶

Reflection:

Vatican II mandated renewal for Religious Congregations. The first major attempt at this by the Third Order Regular was the Madrid Statement. Through commissions, consultation, historical research and the Fourth Franciscan Tertiary Interobediential Congress, many Franciscan Tertiary Congregations believed that the TOR Rule of 1927 was no longer a relevant expression of our identity and charism. The Madrid Statement expressed our self-understanding as Franciscan Penitents in today's world.

The *Analecta TOR* containing the proceedings of the Madrid Congress was sent to all the houses of our Order. The US Federation of Franciscan Sisters promoted the Madrid meeting through their Study Guide. Although information was available, many houses and individuals did not use this opportunity for study and reflection on our roots. The importance of the work being done was not well communicated. The Madrid Statement was considered by many as yet another renewal document.

Many Franciscan Tertiary Congregations did not provide this information for their members. Most Congregations were busy at this time rewriting and updating their Constitutions. Some Tertiary Congregations (especially Sisters' groups) were founded by a member of the First Order; many had

⁵Fr. Louis Secondo, TOR, in a letter to all TOR friars, June, 1974.

⁶This *Study Guide* was compiled and edited by Sr. Rose Margaret Delaney, SFP and Fr. Thaddeus Horgan, SA and published in 1974.

First Order friars as consultants and spiritual directors. These Congregations tended to adhere to a Minorite or Clarisan tradition. Other Congregations were founded for some specific apostolate; and given the TOR Rule by the Church. They did not identify with the TOR and our identity, charism and spirituality as Franciscan Penitents. Available information on these subjects was limited in several languages (especially English); often Congregations were unaware of available sources.

RULES OF THE THIRD ORDER REGULAR

Moving from consideration of revising the TOR Rule, I will now discuss the importance of a Rule, Francis' directives to the Penitents, and the Rules of the TOR over the centuries.

Rule versus Constitutions

A Rule is a sacred document, written by a founder of a religious Order or given by the Church. It is a spiritual document, containing the outline, the guidelines for a particular form of religious life: a specific way of living the Gospel. It is the basic document of a religious Order. On the other hand, Constitutions are legal prescriptions that spell out in greater detail and in practical ways the outline provided by the Rule. (Canon 587:3) The Rule is the skeleton, the Constitutions are the fleshing out of this. A Rule must be approved by the pope; Constitutions may be changed by a General Chapter, then approved by SCRIS. All of the approximately 430 Congregations of the TOR have the same Rule; each has different Constitutions describing their specific lifestyle, ministry, government and formation.

Francis' directives to the Penitents

Many believe that the Franciscan Penitents received their first norm of life from Francis in 1209. Celano says:

Many of the people, both noble and ignoble, cleric and lay, impelled by divine inspiration, began to come to St. Francis, wanting to carry on the battle constantly under his discipline and under his leadership.....To all he gave a norm of life, and he showed in truth the way of salvation in every walk of life.⁷

Some of the early Franciscan Penitents were married; others remained single. Some lived in their own homes; others were hermits, itinerant preachers, members of the clergy. At the time of Francis, some Penitents had begun to live in community. Often the Penitents were involved in some work of mercy, such as staffing a hospital for lepers, or a hospice for pilgrims.

T.O.R. RULES

1215: *Volterra Letter*

This is a first version of the *Letter to the Faithful*. It is an "Exhortation to the Brothers and Sisters of Penance." It was discovered by Paul Sabatier in the Guarnacci Library, Volterra, Italy and first published in 1900. Among the manuscripts of the Letter to the Faithful,

⁷1 Celano, 36-37.

Kajetan Esser says that the "text of Volterra held a special place among all the materials."⁸ It was published among the definitive writings of Francis in 1976.

This early exhortation of Francis to the "Brothers and Sisters of Penance" reveals the foundations of Francis' penitential spirituality as faith and repentance. It illustrates how well Francis had absorbed the Scriptures into his being. It speaks simply of those who do penance (they are happy and blessed), and those who do not do penance (they are blind and lack spiritual wisdom).

The first part of this earliest written message of Francis to his Penitents forms the Prologue of the Rule of the Brothers and Sisters of the Third Order Regular of St. Francis and is also the Prologue of the Rule of the Secular Franciscan Order. Both Orders share the same roots in the ancient Order of Penance and initially shared a common Rule. Our present identity is clearly established in what became known as Francis' Order of Penance.

1221: *Letter to All the Faithful*

Fr. Kajetan Esser, OFM, a noted modern Franciscan historian says:

Though addressed to 'everyone in the whole world', it is not meant for all the faithful indiscriminately, but to those who followed Francis' spiritual direction.⁹

This letter details the characteristics of the penitent and Francis' pastoral guidance to those converted to following Christ. It stresses Catholic doctrine (as opposed to heretical groups of the time): the humanity of Christ and the Sacraments - especially the Eucharist and Penance. Many of the ideas in this letter are from the decrees of the Fourth Lateran Council of 1215.

1221: *Memoriale Propositi* - First Rule of the Order - Honorius III

This Rule juridically codified the spirit of Francis that is reflected in his earlier directives to the Penitents. It contains the essential elements of a religious Order according to a personal and communal program of Francis, centering around the intensification of the Christian life, the rediscovery of the Gospel message, and penance in the sense of conversion. The original text of this Rule no longer exists. Four ancient versions of this Rule, two before 1228, are preserved. One of these, the Venice Rule is printed in the *Omnibus of Sources*.¹⁰ Three important regulations of this Rule had lasting implications for society. The Penitents were forbidden to take a formal oath except if compelled by necessity. This exempted them from military service. They were not allowed to carry lethal weapons. Disagreements and lawsuits were not to be taken to the civil courts for settlement, but to the ministers of the fraternity or to the bishop. This gave them ecclesiastical protection.

⁸Regis Armstrong, OFM Cap. and Ignatius Brady, OFM, *Francis and Clare - The Complete Works* (Ramsey: Paulist Press, 1982), p.62.

⁹Sr. Kathleen Moffatt, OSF, *Guidelines for Instruction to TOR Franciscans on the Origin, Development and the Spirituality of the Penitential Life and Rule* (Pittsburgh: Franciscan Federation, 1981), p.13.

¹⁰Marion Habig, OFM, ed. *Francis of Assisi - Omnibus of Sources* (Chicago: Franciscan Herald Press, 1973), p.168.

1289: *Supra Montem*-Nicholas IV

This came about because of confusion regarding the Rule of 1221 and local statutes and customs. It gave a more orderly and legal arrangement to the Rule and gave the fraternities a uniform character. The right to take vows and live in community is recognized. The Order of Penance is officially called "Franciscan."

The Secular Franciscans observed this Rule until 1883, when Pope Leo XIII gave them a new Rule. It was in effect until 1978, when Pope Paul VI approved the present Rule for the Secular Franciscan Order, *From Gospel to Life*.

1447: *Pastoralis Officii* - Nicholas V

The present Friars of the TOR trace their origins to this; it was more like statutes than a Rule. The pope ordered all small hermit communities in Italy to amalgamate into a regular Order. This union of various male Tertiary groups elected its own central government.

1521: *Inter Cetera Nostro Regiminis* - Leo X

This was a recast of the Rule of Nicholas IV, adapting it exclusively to men and women religious. It required the Brothers and Sisters to take the three vows and to live in community; it did not impose the cloister. It placed the Tertiaries under the jurisdiction of the provincials of the Observants. It was given specifically for Tertiaries dependent on the Friars Minor, not those who were autonomous. Many Tertiary Congregations continued to follow their own statutes based on the Rule of Nicholas IV. The TORs in Italy, who were juridically independent, did not follow this Rule. This Rule of Leo X is quoted in the Papal Briefs approving the Rules of 1927 and 1982.

1927: *Rerum Conditio* - Pius XI

This was not an entirely new document, for the Rule of Leo X is cited and there are references to the Rules of the First and Second Orders. All Third Order Congregations of men and women were placed under this Rule. It was brought about by the new code of Canon Law and given to all Franciscan Tertiary Congregations.

RENEWAL DOCUMENTS OF TERTIARY FRANCISCANS

For many Tertiary Franciscans, the Rule of 1927 did not sufficiently articulate their identity and charism in the post-Vatican II Church. Responding to the Council's request for renewal, several Tertiary Franciscan groups wrote documents to give expression to their Franciscan life as it is lived today. These are listed below.

1969: The Dutch Rule

This was the work of the "Franciscan Cooperation," involving 19 Dutch Congregations. It addressed the Brothers and Sisters of the TOR concerning the Gospel life as Francis expressed it.

1969: Go to My Brethren

This was a spiritual document for Apostolic Communities of Franciscan Women in the United States. It used Francis' Letter to the Faithful and his Testament. It was a non-judicial presentation of Franciscan principles and was used as a springboard for writing Constitutions.

1972: The French Rule

This was written for Franciscan Sisters of the Active Life. It was written under the direction of the First Order and did not reflect the penitential spirituality of the Third Order. It was an adaptation of the 1223 Rule for the Friars Minor.

1973: The German Rule

This spiritual text was written as a basis and model for new Constitutions.

1974: The Madrid Statement of Understanding of Franciscan Penitential Life.

This Statement was approved at the Fourth Franciscan Tertiary Interobediential Congress. It sought to strengthen the bond of unity between the groups of friars and sisters of the TOR. This document gave a distinct and unique direction to the understanding of Franciscan Tertiary life today. It offered a clearer notion of penance in the biblical concept of metanoia, or ongoing conversion. Although we now have a new Rule, this Statement remains a valid spiritual document and expression of our Franciscan Penitential life.

MEETINGS

The Spirit was certainly at work because, within a five year period, several important renewal documents were written. With the exception of the Madrid Statement, all were sponsored by language and/or national groups in Europe and America. We will now look at national and international meetings held to discuss the various renewal documents. These meetings gradually led to cooperative work on the new Rule.

1976 (Nov.): Assisi

This was organized by European Franciscan Sisters, especially the French. It was attended by Superiors General of many European Franciscan Sisters Congregations and representatives of the (male) TOR.¹¹ For the first time, many Franciscan Tertiary Religious were made aware of the existence of the various renewal documents; especially The Dutch Rule, The French Rule, and The Madrid Statement. Following the Assisi meeting, these were to be translated and distributed to participants and Federations. This task was never completed.

1978 (Mar.): Brooklyn

An informal meeting was held at the Brooklyn Brothers' residence at Bishop Ford High School. Representatives of various U.S. Tertiary Congregations active in promoting the Madrid Statement were in attendance. The purpose of the meeting was to share steps Congregations had taken to study and implement the Madrid Statement, and to assess ways for further study of our Franciscan Penitential charism.¹² An ad-hoc committee was formed to coordinate future direction and renewal efforts.

¹¹TORs in attendance were Roland Faley, Paul McMullen, Raphael Pazzelli and Lino Temperini.

¹²Participants included several who had attended the Madrid Congress: Sr. Margaret Delaney, Fr. Thaddeus Horgan, Fr. Roland Faley, Bro. Paul McMullen.

1979 (Oct.): Assisi

This meeting was attended by 150 Superiors General (or delegates) of Franciscan Sisters' Congregations from 27 countries, including 15 from the U.S. TOR friars were not invited. Some Friars Minor (definitors or experts) attended. The purpose of this meeting seemed to be to arrive at a consensus regarding a common Rule for Franciscan Sisters of the active life, using the French Rule as a basic document. This meeting was hosted by the International Franciscan Commission, composed mainly of French speaking Sisters from Belgium, France and Luxemburg; but more recently including Sisters from Italy and Germany. There was much discussion about the authority of this group, procedures, proposals, and the absence of male Franciscan Tertiaries.¹³

Three possible Rule texts were presented for discussion: The French Rule, The Dutch Rule, and The Madrid Statement. A group preference was sought; the decision was made to proceed with work on a new Rule.

The results of the Assisi meeting included the following: The French Rule was accepted by the group as the basic working draft. Two new groups were constituted to oversee the work of the Rule project. These were: The International Franciscan Bureau (BFI), composed of seven Superiors General of womens' Congregations, who would supervise the project. The other group was the International Franciscan Commission (CFI), whose nine members would organize the project.¹⁴ Sr. Roberta Cusack, OSF, Executive Director of the American Federation of Franciscan Sisters was elected to the CFI. An "expert" from each of the four Franciscan Families of men was requested.

A resolution was introduced which invited collaboration and integration of the male Congregations in the Rule project. The goals, process, and results of this meeting were difficult for many of the American Sisters in attendance.¹⁵

1980 (Mar.): Grottoferrata

This was a joint meeting of the BFI and CFI. The decision was made that the Rule project would be common to Tertiary Sisters and friars. The draft document was to contain all the elements of Franciscan spirituality with which the various Congregations are inspired. The basic document would be The French Rule, adapted and modified. All male and female Congregations who follow the TOR Rule were to be notified of the work done and invited to present their observations and proposals. A questionnaire concerning this draft was sent to all members of the U.S. Franciscan Federation in January, 1980.¹⁶

¹³At this meeting Sr. Margaret Delaney presented a paper entitled "Franciscan Penitential Life - TOR".

¹⁴The names and nationalities of the members of the BFI and CFI were published in the *Franciscan Federation Newsletter*, January, 1981.

¹⁵More information about this meeting is included in Sr. Roberta Cusack's report to the Federation of Franciscan Sisters, in the *Franciscan Federation Newsletter*, January, 1980.

¹⁶The *Franciscan Federation Newsletter*, April, 1980, contained an article explaining the TOR Rule project. The May, 1980 *Newsletter* contained *The French Rule*, *The Dutch Rule*, and *The Madrid Statement*. Also included was a questionnaire asking

1980 (Mar.): Pittsburgh

This was a special meeting of Franciscan Tertiary major superiors (men and women) to discuss the Rule project. ¹⁷ The 63 participants heard reports on the recent meetings in Assisi and Grottaferrata. A brief history of the Franciscan Penitential Movement from its birth until today was presented. Discussion centered on a U.S. response and collaboration in writing the new Rule. The group considered a process to use in framing an American response and feedback on the context of the Rule. The suggestions were sifted by the Federation's executive board and responses made. Future issues of the Federation Newsletter would carry information on the document, copies of drafts of the Rule and suggestions for reflection and response.¹⁸

1980 (June): Assisi

This was a meeting of the CFI. A "working group" of persons from eight countries and four continents was appointed; the structure and responsibility of this group was outlined. Sr. Margaret Carney, OSF, and Fr. Thaddeus Horgan, SA, of the U.S. were named to this group. The specific task of this group would be the actual writing of the Rule text.

1980 (June): Rome

The Superiors General of male TOR Congregations met to discuss the initiatives taken toward the revision of the Rule since the publication of the Madrid Statement in 1974. Their conclusions follow:

1. The work done at Madrid on penitential origins, as well as the Statement, remains valid and will continue to be used as a basis for an understanding of our distinct Franciscan spirituality.
2. The Interobediential Congress is willing and ready to collaborate with the International Franciscan Commission in their work to arrive at a common Rule.
3. The Interobediential Congress believes that any ultimate revision of the TOR Rule of 1927 must be common to both men and women religious and be strongly rooted in Franciscan penance.

for a critique of *The French Rule*, as it had been selected at the Assisi meeting as the working paper for further discussion. The responses to this questionnaire were published in the September-November, 1980 Newsletter.

¹⁷The TORs present were: Edmund Carroll, Alberico Candela, Augustine Donegan, Roland Faley, Emile Gentile, Paul McMullen, Louis Secondo, Bernard Tickerhoof.

¹⁸Suggestions of and responses to the Pittsburgh meeting were reported in the Franciscan Federation Newsletter, August, 1980.

4. Fr. Luis Cuesta (Tertiary Capuchin) is the IOC's representative to the BFI and Bro. Columban Keller is the representative to the CFI.¹⁹

1980 (Sept.): TOR Plenary Council

The Plenary Council (General Council and Ministers Provincial) of the TOR met in Spain. Among the agenda topics was the Rule project. After a report by Fr. Raphael Pazzelli, TOR, (one of the four "experts" working with the International Commission) the Rule project was discussed in detail. The Plenary Council concluded:

1. They want to collaborate with the BFI and CFI to maintain the unity of the Tertiary Rule, while holding off a definitive decision until the new draft is evaluated.
2. They wish to avoid haste in order that a solid document may be prepared, which is founded on our own TOR spirituality and history.
3. The central points connected with TOR participation are:
 - a. That there be one Rule for men and women Tertiary Religious.
 - b. That the penitential aspect of our heritage be strongly stated.²⁰

Reute Draft

This is the first of three major drafts of the Rule.

1980 (Sept.): Reute, Germany

This was a meeting of the CFI and the Work Group. Before beginning work on a new draft, the Work Group agreed that:

1. The renewal of, or possible replacement for, the Rule of 1927 is the immediate objective. The long range objective is the renewal of the entire TOR; the preservation of its *propria indolis*, and its continuity with unity despite the diversity of Congregations.
2. The Rule of 1223. The structure of the 1223 Rule was to be used for style and sequence only.
3. The ideas of the Madrid Statement were to be incorporated into the new draft; which would be for "Brothers and Sisters" of the TOR.

After reviewing the responses received from various Tertiary Congregations, the Work Group began to write a draft that would respond to the desire to unite the entire Franciscan Tertiary Family.

They discussed early Franciscan sources as they apply to our penitential charism. Francis' writings to the Penitents of his day (The First and Second version of the Letter to the Faithful) did not envision what today is called religious life. Yet these texts are essential if

¹⁹Bro Paul McMullen, Memo to Major Superiors of Franciscan Tertiary Congregations of Men in the U.S. and ad-hoc committee members, October 31, 1980.

²⁰McMullen, Memo.

we are to be faithful to the "spirit of the founder," as Vatican II teaches. The model the work group followed is Francis' Testament. It begins with what many recognize as the propria indolis of the TOR "The Lord granted me, Brother Francis, to begin to do penance in this way..."²¹

Response to the Reute meeting

Following the meeting of the Work Group, Sr. Margaret Carney submitted a report to the U.S. Federation of Franciscan Sisters. Fr. Thaddeus Horgan sent his observations to Fr. Roland Faley. This report was distributed to the male membership of the Interobediential Congress. Points of clarification were noted, especially those dealing with the charism of metanoia for the Congregations of the TOR.²²

Both Sr. Margaret and Fr. Thaddeus stressed the idea that more research and education was needed by our members to help them understand the writings of Francis, the distinct identity and charism of the TOR and the history of the Order and Rules given to the TOR throughout the centuries.

The December, 1980 Franciscan Federation Newsletter contained articles of background information regarding the Rule project and the Reute meeting. The draft text of the Rule, along with a commentary was included. The research committee of the Federation composed a questionnaire to help individuals and groups critique and comment on the Reute Rule draft.²³

1981 (Apr.): Washington, DC

The Federation Research Committee, together with a special ad-hoc committee compiled, studied and processed the American response to the Reute draft.²⁴ After reading and discussing the responses received, the committee concluded that there were several points of concern among Franciscan Tertiary Congregations in the U.S. These included:

²¹Reports of Sr. Roberta Cusack and Fr. Thaddeus Horgan on the Reute meeting were printed in the Franciscan Federation Newsletter, September-November, 1980.

²²Sr. Margaret Carney's report (Sept.21, 1980) explained in great detail the environment of the Reute meeting, the obstacles encountered and the results achieved. Fr. Thaddeus Horgan's letter (Sept.20, 1980) spoke of problems resulting from Minorite versus Tertiary traditions and spirituality. He urged the involvement of major superiors in the Rule project "so that it truly will be more representative of our Franciscan Penitential tradition."

²³This appeared in the Franciscan Federation Newsletter, January, 1981; along with background information by Sr. Margaret and Fr. Thaddeus.

²⁴The report of this combined committee and the results of the consultation were printed in the Franciscan Federation Newsletter, May-June, 1981. 125 responses were received; 59 of these represented their Congregations.

1. More education about penitential sources and the life and writings of Francis is needed.
2. The TOR charism is seen as: continuous conversion, expressed in literal living of the Gospel.
3. It is important to write a document that would support the unity of the various Congregations of the TOR.
4. Approval of a Rule draft should be provisional; in order to give people time to study and live it.

This report was sent to the IFC.

TOR response to the Reute Text

In December, 1980, Fr. Roland Faley, Minister General, sent copies of the Reute draft, along with pamphlets giving an explanation and justification, to all the TOR Ministers Provincial for distribution to the friars. In an accompanying letter, he said:

The General Chapter of 1977 endorsed the work that we had done at the Madrid Interobediential Congress of 1974. At the same time it was felt that we must maintain ties with the other Rule projects that have been initiated. Our insertion in this work of revision has been constant since 1977. In this work we have adopted the position of maintaining a single Rule for all Tertiary religious, men and women. For that reason primarily, we and the other Congregations which are members of our Interobediential Congress have joined forces with the Franciscan International Commission to produce a single text.²⁵

In a letter to the friars, Fr. Raphael Pazzelli, one of the four definitors appointed to assist the IFC, added to the words of Fr. Roland:

...in the year 1980 there has been plenty of collaboration from the various Congregations that profess the Rule of the TOR. Our point of view (penitential spirituality) is being recognized today. This is due, to a great part, to the addition of American members in the working group and in the International Franciscan Commission.

Some may object that this new project (Reute draft) is not totally permeated with the penitential element like that of the Document of Madrid. ...the Rule project will have to serve all Tertiary Congregations and many of these Congregations were begun in the last century completely outside the penitential spirituality.

As a general principle that all accepted - it was agreed to put in the Rule project the various elements of Franciscan spirituality by which the various Congregations are inspired. Later it will be the task of every Congregation to stress those elements more properly their own, using supplementary documents as our Document of

²⁵Fr. Roland Faley, TOR, letter of Minister General to Fathers Provincial, December 8, 1980.

Madrid. In this way we are able to keep the unity of the Rule for the entire TOR family."²⁶

Both Fr Roland and Fr. Raphael asked that the text be studied by all the friars and comments and concrete modifications sent to the Provincials. After the Provincial Curias discussed the project, all material, both from friars and Curias was to be forwarded to Fr. Raphael in Rome.

A copy of the summary of comments and suggestions of friars, houses, Plenary Council and Provincial Curia was forwarded to Fr. Roland and Fr. Raphael in Rome. Copies of this report were also sent to all the houses of the Provinces and to the Research Committee of the Federation to be included in the American response to the Reute draft.

Response of Minister General

In a memo to the TOR General Curia, Fr. Roland Faley gave his personal reflection on the developments toward a new Rule. He noted that a positive step was the fact that all were working to produce one text that would eventually become a Rule for all Franciscan Tertiaries. He felt that the present draft (Reute) was not clearly framed within a spirituality and distinct charism. Although he favored the Madrid Statement, he would be willing to put it aside if something better were developed. He was concerned about the time frame, saying:

At the very moment when new studies are appearing on the origins of the Order and the whole Tertiary tradition, should we not have the patience to wait for the results and develop something which would have a very solid base?²⁷

He wrote to the director of the CFI assuring them of his collaboration.

Brussels Text

1981 (May): Brussels

This was a meeting of the Work Group to collate and discuss responses to the Reute text. Responses to this draft were received from 205 Congregations, 16 Provinces of International Congregations and the Research Committees of the American and English Federations. These responses came from 30 countries and were in 10 languages. Approval of the Reute draft was given by 105 Congregations. With approximately 430 TOR Congregations, this was the most extensive consultation ever undertaken in the entire Order.

Before writing the Brussels text, the work group studied several sources; the writings of Francis, the history of the Order; the post-Vatican II documents of Franciscan renewal; the responses received from TOR Congregations and the TOR Rule of 1927. From this emerged a conviction that four primary characteristics of the charism of Francis should be foundational for the revised Rule: penance (metanoia); prayer; poverty and minority. Three other related values also ran through the text: peace; joy and simplicity.

²⁶Fr. Raphael Pazzelli, TOR, letter to the friars, December 8, 1980.

²⁷Fr. Roland Faley, TOR, Memo to (TOR) General Curia, March 2, 1981.

Each of the three Tertiary Franciscan renewal documents (the French Rule, the Dutch Rule, the Madrid Statement) represented current Franciscan consciousness as seen by various groups and Congregations. None contradict the other, but there is a difference in emphasis. These perspectives had to be brought into harmony and then placed alongside the TOR Rules. The new text had to be acceptable to all: Congregations of men and women; contemplative and active; Congregations of vastly different historical and cultural roots.

The Reute text was heavily influenced by the Rule of 1223 and the Testament of Francis. The Brussels text made greater use of the Rule of 1221 and the first and second versions of the Letter to the Faithful. This new document was written almost entirely in the words of Francis and as such was a radical departure from all our past Rules. Its intent was to give us Francis' proposal for our life of total and continuous conversion to God through literal living of the Gospel.

The Brussels text was shorter than Reute. The number of chapters was reduced from twelve to eight and the number of articles reduced from thirty five to twenty eight. An optional prologue was added (the first part of Francis' Exhortation to the Brothers and Sisters of Penance) and an epilogue which included the blessing of Francis. The title for the Order was changed from Religious Franciscan Order to Regular Order of St. Francis. This title parallels that of the Secular Franciscan Order, with whom we share our roots, heritage, and early Rules.

The CFI and BFI announced a meeting of all Superiors General of Franciscan Congregations who follow the TOR Rule to be held in Rome, March, 1982. The purpose of the meeting was to work towards acceptance of the Brussels text as our TOR Rule. If agreement could be reached, it would be submitted to SCRIS.

Response to the Brussels Text

Although extensive consultation was not provided for, several important meetings were held to discuss the Brussels text.

1981 (Aug.): Annual Federation Council Meeting

At the annual AFC meeting, the history of the Rule project and the Brussels text were explained and discussed.²⁸ What became apparent at this meeting was the fact that while a new written document was being prepared, greater values underlying the words of the text were being uncovered.

With the approval of the statutes revision, the Federation of Franciscan Sisters became the Franciscan Federation of the Brothers and Sisters of the U.S. Beginning with the Interobediential Congress in Madrid in 1974, the U.S. Federation of Franciscan Sisters and the male Congregations who follow the TOR Rule had cooperated in many ways. These included: the Rule project; workshops and retreats devoted to the charism and the identity and history of the Franciscan Order of Penance. Now they form one Federation.

Text publication

²⁸Among the participants were Sr. Margaret Carney, Sr. Roberta Cusack, Fr. Thaddeus Horgan, Fr. Raphael Pazzelli. Sr. Ann Carville succeeded Sr. Roberta Cusack as Executive Director of the Franciscan Federation and U.S. representative to the CFI.

In August, 1981, the U.S. Franciscan Federation published the Brussels text, including an introduction of this proposed draft and a commentary by Sr. Margaret and Fr. Thaddeus. This was widely distributed. No large scale response to the Brussels text was planned, as happened with the Reute draft. Suggestions were to be sent to Superiors General (who would be meeting in Rome) or to the U.S. Federation, which would forward them to the Work Group.

TOR response to the Brussels Text

In October, 1981, Fr. Alberico Candela, TOR, Secretary General, sent copies of the Brussels text through the Ministers Provincial to all the houses of the Order. The English translation was prepared by the European English speaking group working on the Rule project. The Rule text was accompanied by an explanatory presentation. This contained information on the nature of the Rule draft, replies from various TOR Congregations, title of the Order, structure of the draft text and sources.

1982 (Feb.): Assisi

At the invitation of Fr. Roland Faley, TOR Minister General, the members of the Franciscan Tertiary Interobediential Congress met in Assisi. The purpose of this meeting was to discuss the Brussels text and to plan their strategy for the upcoming Rome meeting. Sr. Margaret Carney and Fr. Thaddeus Horgan were also present at this meeting.

Rome Text

1982(Mar.): Rome

Nearly 200 Superiors General (of approximately 430) attended, representing 35 countries and nearly 200,000 Franciscan Tertiary religious. Also in attendance were members of the BFI, CFI, and Work Group. The purpose of this International Assembly was to discuss the Brussels text, with a possibility of this eventually becoming a new TOR Rule.

The BFI and CFI were responsible for the preparation, coordination and proceedings of the assembly. Members of the Work Group gave presentations on contemplation, poverty, minority and conversion. They presented in outline form the content of each chapter of the proposed text. Language groups of participants studied the text and proposed amendments.

The following changes were made in the Brussels text:

1. One article (n.10 in the Rome text) on the life of contemplation was added.
2. The prologue (words of Francis to his followers) and epilogue (blessing of Francis) were to be an integral (not optional) part of the text.
3. The title was changed from Regular Order of St. Francis to Third Order Regular of St. Francis.

The Rome draft was approved by the Superiors General (188 to 2). The BFI was instructed to prepare a final text for presentation to the Holy See for their examination and approval.

The members of the Assembly were received in private audience by Pope John Paul II. Sr. Elizabeth Delor, president of the Assembly, in her remarks to the Holy Father on the purpose of the visit, said:

We are today repeating that which St. Francis did when he presented himself to the Lord Pope and asked for the approval for his way of life.²⁹

The Holy Father recalled that like Francis (we) profess:

Fidelity and submission to Holy Mother Church and to the Lord Pope. This attitude is all the more significant in that your objective is to renew the Rule of the Institutes of the Third Order Regular of St. Francis, conforming them to the guidelines of the Second Vatican Council and of submitting this project to the approval of the Apostolic See.³⁰

The Rule text approved by the Superiors General in Rome was published in the March-April, 1982, Federation Newsletter. A reflection on the Rome Assembly by Sr. Ann Carville, OSF, was published in the July-August, 1982, Newsletter and Pope John Paul's discourse was printed in the November-December, 1982 Newsletter.

TOR response to the Rome Assembly

In a circular letter to all the friars, Fr. Roland Faley, Minister General, reflected on the Rome Assembly he had attended. Despite diverse currents of thought on the Rule text and some lack of understanding regarding the history, charism and identity of the TOR, Fr. Roland believed that the conclusions of the Assembly were positive. Mutual respect grew into a better understanding and finally a true sense of oneness. The Lord was at work!

RULE APPROVAL

Following the Rome Assembly, the amended Rule text was submitted to the Sacred Congregation for Religious (SCRIS) and approved by it in October, 1982. The only change made was the addition of Chapter Four (articles 14-17) on **The Life of Chastity for the Sake of the Kingdom**. The Rule text was then submitted to the Holy Father by Cardinal Pironio, Prefect of SCRIS on December 17, 1982, "...asking him to kindly ratify it by a solemn Pontifical document, dated December 8."³¹ In a letter dated April 30, 1983, Cardinal Pironio informed the Sisters and Brothers of the Third Order Regular of the papal approval of the new Rule.

Pope John Paul II officially approved the Rule and Life of the Brothers and Sisters of the Third Order Regular of St. Francis in the Brief *Franciscanum Vitae Propositum*. In it he said:

Since we know how diligently and assiduously this 'Rule and Life' has traveled its path of *aggiornamento* and how fortuitously it arrived at the desired convergence of different points of view through collegial discussion and consultation, for this very

²⁹Sr. Elizabeth Delor, OSF.

³⁰Franciscan Federation Newsletter, July-August, 1982. Franciscan Federation Newsletter, July-August, 1982.

³¹Edward Cardinal Pironio, letter to Reverend Sisters and Brothers (of the TOR), April 30, 1983.

reason with well-founded hope We trust that the longed for fruits of renewal will be brought to full realization.³²

On May 11, 1983, the BFI sent news of the approbation of the new TOR Rule. In their letter, they said:

We have placed our renewed Rule, the fruit of so much work of interchange and collaboration, into the hands of our Holy Mother the Church and today, we receive it, confirmed by the Pope, as a precious gift, an inestimable treasure entrusted to our fidelity.³³

TOR Response to the new Rule

In his report to the TOR General Chapter, Fr. Roland Faley, Minister General said:

On April 27, 1983, I was informed by the Holy See that the Holy Father has approved the Rule and it bears the date of December 8, 1982. I do believe that the revised Rule, in which our penitential charism is presented as a basic value, also allows for the spiritual heritage of other Tertiary Communities, while retaining the one Rule of the entire TOR Family.³⁴

Several proposals of the General Chapter spoke of the new Rule. Among them are the following:

1. The General Chapter receives with joy the news that the Holy Father confirmed with a pontifical Brief the Rule and Life of the Brothers and Sisters of the Third Order Regular of St. Francis and invites the entire Order to accept in a spirit of fidelity and submission to Holy Mother Church and to the Holy Father this spiritual document.
2. The General Chapter sees this Rule as an inspirational document which expresses the fundamental lines of our spirituality and tradition...Another value of this Rule is the fact that it unites in a special way all the Brothers and Sisters of the great family of the TOR of St. Francis.
3. Recommendation:

All should consider seriously the contents of the new Rule and this can be done by personal initiatives and by groups of study and reflection both in the local

³²*The Rule and Life of the Brothers and Sisters of the Third Order Regular of St. Francis and Commentary* (Pittsburgh: Franciscan Federation, 1983), p.6.

³³Sr. Elisabeth Delor, OSF, President of the International Franciscan Bureau, letter to the Brothers and Sisters of the Third Order Regular of St. Francis, May 11, 1983.

³⁴*Acts of the 106th General Chapter of the Third Order Regular of St. Francis of Penance*, Rome, May 8-21, 1983, p.49.

communities and in the Province. This also can be done together with other Tertiary Congregations as a common endeavor, and this indeed might be a better way.³⁵

In his first letter to all the friars of the Order, the new Minister General, Fr. José Angulo, TOR, spoke of the new text of the TOR Rule. Not only is it to be studied, but it is to be assimilated and put into practice. He reminded the friars of the fundamental aspects of our charism emphasized in the Rule: penance; prayer; attention to the poor and all who suffer.

If we come to a clear understanding of our Rule, we will find in it many points to help us renew our fraternities and to place ourselves at the service of the world of today and its many problems.³⁶

Reflection and Summary

The approved Rule is part of a long process involving many people. The final text is the result of consultation, collaboration, editing, sacrifice and a search for unity in a common charism in the midst of the the diversity of many Congregations. The Rule is a spiritual and inspirational document written in Francis' words. It presents the evangelical counsels; insisting on the "attitudes" of poverty, chastity, obedience. It treats the four fundamental values: conversion; poverty; minority and contemplation, woven in the web of fraternity, lived in simplicity and joy.

The U.S. Franciscan Federation prepared and published the new TOR Rule and Commentary. In her "Commentary Introduction" to the new Rule, Sr. Margaret Carney said:

The new Rule engenders renewed life. It gathers us in a new place between the monuments of our past and the horizon of the future towards which we move in alternating passages of light and dark. Our Amen! to this Rule binds us together for a new stage of the pilgrimage of penance and peacemaking in our time.³⁷

The Significance of Writing a Rule

The above details to some extent the process that took place in writing our new TOR Rule. Emphasis was given to the TOR point of view. What did this process signify?

As was mentioned earlier, a Rule is a sacred document, written by a founder of a religious Congregation (Francis' Rule of 1223 to the friars of the First Order), or given by the Holy See (the various Rules of the TOR over the centuries).

The uniqueness of the present TOR Rule is that it was written by members of the Order. Momentum for a new Rule came from the grass roots: various organizations and federations trying to express Tertiary Franciscan spirituality in the post Vatican II Church. During a ten year period meetings were held, world-wide consultation of members achieved and approval given by Superiors General to a new Rule text. That this happened is more amazing considering the diversity of languages, cultures and nationalities, lack of understanding by many of the history and charism of the Franciscan Order of Penance, and the absence of any one juridical body with authority over all.

³⁵*Acts*, p.104.

³⁶Fr. José Angulo, TOR, Letter to all the Friars of the Third Order Regular of St. Francis of Penance, November 17, 1983.

³⁷*Rule and Commentary*, p. 4.

That we did our work well is evident in that the Holy See changed nothing in the Rule text that was submitted. A chapter (on Chastity) was added and our new Rule was approved by Pope John Paul II.

In the Rule commentary, Sr. Margaret Carney says it well:

No other generation of the Third Order Regular has enjoyed the immense responsibility and the privilege that this time in history has bestowed upon us. Due to the developments in the theology of religious life, the ecclesiology forged by the Council, the scholarship that has resurrected authentic source material for our use, the technology of modern travel and communications - due to all of these factors, and due most especially to the insistent promptings of the Holy Spirit, we have had the opportunity to help formulate our Rule.³⁸

We were consulted in the formulation of the new Rule, now we must "own it" and take responsibility for putting it into practice in our own lives.

Bro. Paul McMullen, TOR

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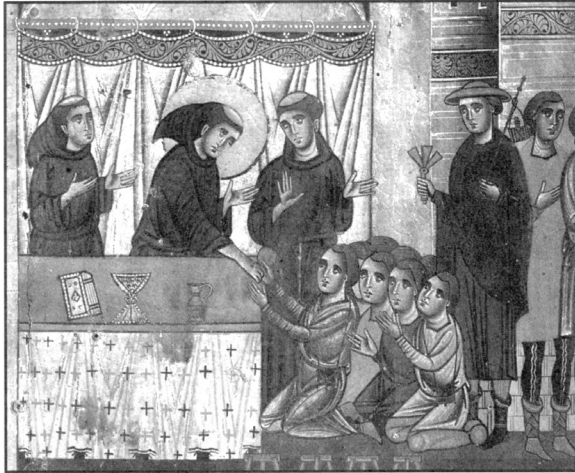
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Thaddeus Horgan SA (back) in discussion with Roland Faley TOR during the Rome Assembly which gave us our new TOR Rule, March 1982



“Francis Accepts the Merchant Lucchesio and His Wife into his community in Poggibonsi, near San Damiano” (the beginning of The Third Order of St. Francis), detail from the panel painting Saint Francis and Scenes from His Life: Church of Saint Francis, Pescia; Bonaventure Berlinghieri.

The Evolution of the Rule of the Third Order Regular

“To do penance” is the genesis of the spiritual journey of Francis: *“The Lord inspired me, Brother Francis, to embark on a life of penance”* (Testament 1). It is important to understand this expression in the Gospel as meaning conversion, a going away from the spirit of the world toward a total consecration of oneself to God. ... It is altogether certain that the Poverello by his word and example raised up a penitential movement that was marked by his charism. ... The Third Order, although it was founded for persons who were not able to abandon their obligations in the world, began to evolve towards regular community life about the end of the thirteenth century. This development was due in part to the social-political situation of women at this time and to the appearance of many religious societies and the desire for a more perfect way of life in caring for the poor and the sick.

Bearing Christ to the People. Pierre Peano OFM, translated by Aidan Mullaney TOR & Thomas Edwards TOR
Franciscan University Press, Steubenville OH 1996. p17,21,23

1289 (Nicholas IV) ... 1521 (Leo X) ... 1927 (Pius XI)

Supra Montem: Rule of Nicholas IV, August 18, 1289 - Rieti, Italy



Nicholas, Bishop and Servant of the servants of God, to our beloved sons and daughters in Christ, the Brothers and sisters of the Order of Penance, both present and to come: greetings and apostolic benediction!

It was upon the rock of the Catholic faith that Christ's disciples established the Gentile nations, who up to then had been walking in darkness, when, with sincere hearts burning with divine love, they carefully preached the Gospel to them. This same faith, the solid foundation of the Christian religion, which cannot be shaken by storms or tossed about by the waves, the Roman Church continues to maintain and serve....

Wherefore the glorious confessor of Christ, blessed Francis, the founder of this Order, pointing out by words and example the way leading to God, instructed his children in the purity of this same faith. He wanted them to *confess it boldly, retain it firmly, and carry it out in their deeds.*

Supra Montem - 1289

- The officially recognized Rule of the Third Order Regular until 1521, and of the Secular Tertiaries until 1883;
- The “Order of Penance” is officially called “*Franciscan.*”
- Global themes: love of poverty and the struggle against greed; love of the cross and the struggle against sensuality; love of humility and the struggle against pride.
(This could be read as a Rule emphasizing the Vowed Life; however, it was written for all the voluntary penitents seeking to live the Gospel in the spirit of Francis and Clare, and has a distinctly *lay* character. The text substantially remained that of the Ancient Rule 1221-1228)

*** 1289 - 1521: Two Hundred Year Transition - Monks and monasteries ...**
Marco Polos’s Travels ... Dante’s Divine Comedy ... Ottoman Empire ... Hundred Years’ War -(France & England) ... Ming Dynasty in China ... Black Death ... Aztec Civilization in Mexico ... Giotto depicts *Life of St. Francis* on Basilica walls in Assisi ... Chaucer’s “*Canterbury Tales.*” ... Gutenberg’s moveable type ... Overthrow of Byzantine Empire - (end of Middle Ages) ... Spanish Inquisition ... The Renaissance ... Columbus discovers America ... Henry VIII in England ... Slave ships sail to America ...



Inter Cetera: Rule of Leo X, January 20, 1521 - Rome, Italy

*** *Because of the spread of the Order of Penitents of St. Francis to the whole Christian world, there was a need to draw a clear line of separation between fraternities of Tertiaries living “in the world” and groups of brothers and sisters who had taken vows and were living a common life.***

- Written expressly for franciscan religious tertiaries;
- Reflects the call to reform of the V Lateran Council (1515-1517) - This can be seen best in Chapter X:
All and everything contained in this Rule is a matter of counsel, to facilitate the salvation of the soul, and nothing is obligatory under pain of sin. ... The Brothers and Sisters are obliged to keep the three essential vows... Those Sisters are also bound to observe enclosure, who have expressly vowed the same; and this we permit to every Convent, *provided that the charity which they are accustomed to exercise toward the sick, or religious propriety suffer no detriment.*
- Provided for OFM “Visitor” annually to TOR Houses; some Tertiary Congregations kept to Rule of Nicholas IV, 1289 in protest.

1521-1927: Four Hundred Year Transition - The Elizabethan Age ... Protestant Reformation ... Council of Trent ... Ottoman Empire ... Settlement of North America ... The Age of Enlightenment ... Industrial Revolution ... American War of Independence ... French Revolution ... Napoleonic Suppressions ... Irish Famine ... American Civil War ... Victorian Age ... Rise of German Empire ... WWI ... Russian Revolution ... Gandhi in India ...



Rerum Conditio: Rule of Pius XI, October 4, 1927 - Rome, Italy



Pius, Bishop, servant of the servants of God, as a perpetual memorial of the matter: Such was the state of affairs, especially in Italy, towards the close of the twelfth century and for some time thereafter that, though Christendom was universally established in the Faith, still great numbers of people, going astray in the quest of transient things, and puffed up with the pride of life, gave way to every depravity of morals, and *as the charity of Christ ran low*, fell everywhere to nursing feuds, plunging the various communities into disastrous civil strife.

Now it is well known that the task of reforming society in those days was committed by God particularly to **Francis of Assisi**, who strove *to unite the world in mutual charity* by off-setting unbridled vice with the pursuit of Christian humility and poverty. So it was that, as vast numbers of disciples rallied about this remarkable man, the family of Francis grew to an extent that was truly boundless, being swelled by the members of the three Orders *which Francis himself founded*, as also by those **Tertiaries** who in their desire for greater perfection began to lead a life in common, and became known as **members of the Third Order Regular**.

- This Rule took into account Franciscan spirituality and legislation contained in the new Code of Canon Law;
- The emphasis on *charity* can be considered a hallmark of this Rule;
- “There is no question at the present time that congregations inserted the New Rule as an introduction to their Constitutions, but *it held a very hidden and rose-thorned position*. Their life, previously regulated, continued to follow its established way. *Neither rules nor customs were adopted or formed to conform to the spirit of the New Rule.*”

Cajetan Esser OFM. **Life and Rule**. A Commentary on the Rule of the Third Order Regular of St. Francis. FHP, Chicago IL, 1967, Preface,p.ix.



***The Heritage of the three Rules giving shape to the 1982 Rule
and the rebirth of a charism.***

1. Each Rule calls the penitent to *reconciliation with one's neighbor* as witness to a sincere desire (and ability) to live a life of continuous conversion.
2. The Eucharistic Liturgy is a daily component of this penitential spirituality, even though in earlier centuries, the *reception* of Eucharist could be only three times a year. The Sacrament of Reconciliation could also be received three times a year.
3. Care of the sick, even to mitigating the *cloister* observance, is a very important witness in this life.
4. Each Rule calls the Franciscan to nourish his or her spiritual life by monthly days of *Renewal*, and enrichment through spiritual conferences.
5. The Rules of 1289 and 1521 presents the penitential spirituality more in terms of deeds, or actions to perform (fasting, alms, prayers); The Rule of 1927 places greater stress on *charity*.
6. In the writing of all the Rules, the members of the Third Order had *minimal* voice in the development of these Documents.
7. *None* of the Rules contain selections from the Writings of Francis and Clare except for the final blessing from Francis' Testament which concludes ALL of the rules.

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**Franciscan Federation TOR
Washington D.C., 1998**

HISTORY OF THE THIRD ORDER REGULAR RULE: A SOURCE BOOK

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INTRODUCTION

The grace of the work that produced the pontifically approved text for The Rule and Life of the Brothers and Sisters of the Third Order Regular of St. Francis in 1982 has several sources. Multiple streams fed the font of energy and enlightenment that gave rise to this first international collaboration in TOR history. Let us enumerate the most important of these.

PART ONE: THE INTERNATIONAL QUEST FOR A NEW FRANCISCAN RULE

THE SECOND VATICAN COUNCIL

On the morning of October 11, 1961, a seemingly endless line of bishops processed into the immense nave of St. Peter's Basilica over the rain-washed stones of its grand piazza. The procession, which took most of the morning to complete, was the first ritual of a convocation whose four sessions would leave the Church dramatically altered. From these meetings it emerged as an institution shaking off centuries of placid self-sufficiency in favor of a new engagement with the world. The recognition that certain groups within the Church would serve as important catalysts of the agenda the Council fathers advanced was crystallized in a number of actions they took. After the Council's close (and the death of John XXIII) the implementation phase was deftly led by Paul VI. One of his early actions was the publication of a short *motu proprio* instructing members of religious congregations to update their norms and adjust their customs to the demands of modern society in service of a more effective evangelizing program. Known by its title, *Ecclesiae Sanctae*,¹ this seldom quoted papal directive set in motion a veritable hurricane of

¹This document can be studied in its original form by reference to AAS 58 (1966): 757-87 or retrieved through <http://www.vatican.va/archive/hist_councils/ii_vatican_council/index.htm>. Part II details the norms for renewal of religious institutes, 775-82.

activity that would later cause serious backlash not only within Vatican circles, but in national episcopacies as well. Nonetheless, during the Council's period of *aggiornamento* the promotion of experimental and democratic processes to do the work of analysis and acceptance of the Council's teaching was decisive. The foundations were being laid for a new moment of opportunity in the Franciscan family which was also moving from a hierarchical model of governance (not unlike most institutions in the church) to a more fraternal and cooperative *modus operandi*.

FRANCISCAN EDUCATION FOR RENEWAL

Franciscans pondered the exhortation to "return" to the "charism of their founders" found within the exhortations of Paul VI as he invited religious women and men to take up this task at a crucial time. The response to the mandate was, for the most part, enthusiastic. However, the route of return was by no means certain. In spite of decades of scientific research by scholars in Europe, many rank and file Franciscans lacked knowledge of primary sources. The difficulty of creating a modern hermeneutic for the deeds and documents of long ago was substantial. Franciscan friar theologians and other experts, often trained in the leading schools of the continent, were well aware of contemporary scholarship that was launching exciting new approaches to Franciscan source materials. The scholars of Grottaferrata, the faculties of the Antonianum, Laurentianum or Seraphicum, and those editing critical editions in a variety of settings including the Franciscan Institute of St. Bonaventure University, formed a small army of experts making primary resource material available more widely than at any previous time in Franciscan history.

As the necessity of providing Franciscans with the academic programs to augment and support more popular and accessible formation workshops and institutes, a multi-layered response took shape. Programs sponsored by universities at undergraduate and graduate levels provided invaluable educational opportunities to many. At present the English-speaking world enjoys "an embarrassment of riches" in this regard. The Franciscan School of Theology at the Graduate Theological Union of Berkeley, California; the Franciscan Center of the Washington Theological Union; The Franciscan Institute/School of Franciscan Studies of St. Bonaventure University; The Franciscan International Study Centre at Canterbury, England. In addition, the Association of Franciscan Colleges and Universities includes a number of liberal arts colleges with a Franciscan educational institute or a designated academic leader charged with sharing solid Franciscan intellectual preparation with faculty and students alike.

When the Franciscan Institute re-opened its teaching program in 1971 under the direction of Conrad Harkins, O.F.M., its goal was to bridge the gap between the scholarly community and the vast number of Franciscan sisters and friars whose need and desire to master this material was increasingly apparent. By the time the first cohort of M.A. students graduated from the Franciscan Institute, a faint note of frustration was emerging within the student body. Students who were members of the Third Order Regular increasingly sought answers to questions about *their* historical origins, about what differentiated them from the “First Order,” or the Order of Friars Minor. Neither faculty nor library had much to offer by way of response. The timing of this emergent and constructive discontent—the late 1970s—was providential. The realization that the Third Order Regular lived and worked in the shadow of its better-known elder brother, the First Order, was taking shape at the very time that the invitations to international assemblies of Third Order Regular congregations were beaming around the globe. It is to these early assemblies that we now turn.

CONVENING THE THIRD ORDER REGULAR MEMBERS

Prior to the advent of computerized information systems, a large and somewhat awkward item known as a Rolodex stood on the desk of every secretary worth his/her salt. The Rolodex was a miniaturized card catalog that allowed you to record an address and other pertinent data in a small rotating set of cards that could be quickly retrieved by spinning the file with a side handle. It was a marvelous tool and allowed one to add and delete numerous entries with efficiency and speed. As one official of the Vatican Congregation for Religious Life (as it was then known) reminded me, our branch of the Franciscan Order had “no Rolodex” well into the twentieth century. In other words, there was no central office or coordinating body that permitted efficient and regular communications among the nearly four hundred different groups of sisters, brothers, nuns and mixed masculine congregations that comprised the Order. For that reason, while the three branches of friars (Capuchin, Conventual, Observant) began to meet in post-counciliar general and provincial chapters before the end of the 1960s, the Third Order Regular taken as a whole remained de-centralized with disconnected communications. The “Order” was and remains an amalgamation of some four hundred autonomous institutes or congregations.² One of the most ancient is the congregation of priests and lay friars, which bears the an-

²The Third Order Regular is constituted in such a way that new foundations are constantly being incorporated into it. For that reason providing exact statistics on current numbers of congregations is not easy. The International Franciscan Conference of the Brothers and Sisters of the Third Order Regular (IFC-TOR) has its office in Rome and

cient title of Third Order Regular. Its generalate is in Rome, its current corporate lineage dates to the fifteenth century and its general minister in modern times is seated alongside the generals of the three branches of the First Order according to pontifical protocols.

When the “Rule Project” was in its earliest stages, lists of congregations and institutes were laboriously developed. However, certain historical confusion and mis-information prevented many groups from being included in early communications. To give some grasp of the variety this includes we consider that its taxonomy is shared by the friars of the Third Order Regular as described above; multiple monasteries of contemplative nuns; active congregations of sisters and brothers numbering from those of a dozen members to those in the thousands. Some of these are resident in a single diocese. Others are trans-continental in scope. There is no single canonical governing structure and each approved institute has its own superior and recognized status in the Church. If ever an entity was guilty of causing bouts of “seraphic confusion,” the Third Order Regular is at the top of the list.

In the more developed nations of that period (e.g., Western Europe, the United States, Brazil) national federations or cooperative organizations were created. The prerogatives were limited; membership was voluntary. However, such national organizations did speed the work of formative education to bridge the gap between the grass roots membership and Franciscan experts. Little by little some of these national groups acknowledged the need for international collaboration. However, in the absence of any central governing body, initial efforts were limited and, at times, communications did not meet their target. Nonetheless, congregations with members in multiple nations were the first to experience and then facilitate the importance of finding unifying threads and congresses to test for international consensus on questions of identity within the Church and mission in the modern world. It is also a credit to the branches of the First Order that many friars whose ministry placed them in frequent contact with Franciscan sisters/brothers, advocated for more national and international exchange during this period of ferment and new educational options. The generals of the three branches were generous in granting financial support to host certain early meetings and releasing some of their best experts to serve as animators of these efforts.

its Secretary General will provide current statistics upon request. <ifctorsg@tin.it> or <<http://www.infracon.org>>.

RENEWAL ASSEMBLIES OF THE THIRD ORDER REGULAR³*Madrid, 1974*

In 1974, the masculine congregations of the Third Order Regular held a congress in Madrid, Spain.⁴ The primary directing energy emanated from the TOR generalate in Rome and sought the cooperation of other masculine institutes of the Order. Sponsorship was vested in a structure known as the Inter-obediential Congress. This Congress was a vehicle of communication between and among the masculine entities of the Third Order Regular that dated from the mid-twentieth century. The Madrid Assembly was its first reunion following the close of the Council in 1964. The TOR friars and brothers included a number of guests from conferences of TOR sisters, thus demonstrating an important recognition that the rule and history of the Third Order is not the monopoly of any one canonical institution. The study document issued by this congress found immediate acceptance among Third Order congregations in the U.S. where the new national Federation became the vehicle for its dissemination. It served as a guide for recovery of an authentic and historically rooted appreciation of Third Order identity.

Assisi, 1976

In 1976, a group of Western European sisterhoods hosted an assembly in Assisi. They had the blessing and financial backing of Minister General, Constantine Koser and the cooperative approval of Capuchins and Conventuals. At its conclusion, the participants agreed to the utility of additional efforts to work together on documents for formation for future generations of post-council members. Part of the impetus for this meeting was the growing recognition that many national groups were formulating identity statements to be used as the basis for renewal and, in particular, as the basis for renewing formation studies and methods. (Remember that in 1968, the Congregation for Religious had issued its directives on renewing the novitiate programs, *Renovationis causam*, with allowances for dramatic departures from conventional and cloistered programs.)⁵ Those in a position to observe the good effects of such efforts (ministers general with international experience, Vatican officials receiving periodic reports and visits) saw an opportunity for synergistic collaboration and offered their services in promoting that.

³The IFC-TOR (see note above) maintains the archives of the activities that culminated in the papally approved Rule of 1982. Records of the assemblies, communications with congregations, consultation results, and most important materials can be located there.

⁴Full documentation found in *Analecta Tertii Ordinis Regularis Sancti Francisci*, vol. 13: 123, (1974).

⁵*Renovationis causam* in AAS 61 (1969): 103-20.

This assembly traced its beginnings to a Francophone project sponsored by twenty-five congregations headquartered in France and Belgium. Over several years this collaboration produced a text of twelve chapters, following closely the structure and language of the Rule of St. Clare, and disseminated for study in 1972. Before long, this proposed text was known widely as “the French Rule.”

Representatives of the masculine branch of the Order registered two concerns: 1) the text was prepared for and directed only to sisters’ congregations and 2) the penitential foundations of the Order were not acknowledged in the construction or content of the text. While rediscovery of this font of identity had only recently been publicized, the French project had developed along lines that were questioned by those striving to locate the origins of the tertiary congregations more precisely.

STRUCTURAL SUPPORT SYSTEMS

At this point the superiors who had already experienced international assemblies had established an ad hoc structure to carry the project forward, now normally called “the Rule Project.” There were three bodies assigned to this work. The International Franciscan Bureau (BFI) was a governing board made up of superiors from a variety of institutes, and charged by their peers with oversight of this important pioneering effort. The International Franciscan Council (CFI) assisted them. This latter body had several executive directors or secretaries of national federations as members and several other members with specific expertise in organization of international meetings and communication. Their task was the management of documentation, translation, and communication to the growing new “rolodex” of TOR institutes worldwide. Finally, a task force to be known as the International Work Group was appointed. The CFI and BFI invited into this group representatives from North and South America, India, and Western Europe who had sufficient knowledge of sources and texts and sufficient personal expertise to serve as editors and authors of the text that would emerge from such a vast consultation. This Work Group was to function in a tertiary role, serving mostly in the background to provide the BFI members with a well-crafted document for consultation with their peers. This consultation was to be completed in time for the anniversary of Francis’s birth in 1982. What follows below is a more detailed exposition of these events.

Assisi, 1979

When a second general meeting took place in 1979, approval of the adoption of a renewed rule text was the primary goal. The French Rule was voted as the official working text. The assembly did, however, experience the dramatic power of unresolved issues of historical identity,

the concerns arising from affiliations with various branches of the Friars Minor, the major differences in the nature of this wide array of institutes with different national and international cultures and apostolic origins, and the lack of precedent for doing an international collaboration of such importance with this group of institutions. The success of the assembly must be acknowledged and its importance cannot be underestimated. The result of honest grappling with these issues led to important resolutions on the part of the leaders of the movement. The following decisions were to have critical importance:

1. The International Franciscan Bureau (BFI) was created consisting of six general superiors of TOR congregations. These six men and women had the responsibility—delegated by their peers—to supervise the entire project and submit its results to the Holy See at the appropriate time.
2. The International Franciscan Commission composed of nine members would organize procedures and criteria for drafting a final rule text.
3. The masculine congregations would be fully included in future deliberations and consultations.
4. Consultors from the four men's branches of the First Order would work with both the BFI and CFI, but would not have voting rights.

The plan articulated by this assembly projected submitting the final text to the Holy See in the name of the whole Order to replace the Rule approved by Pius XI in 1927. In spite of the careful work that multiple European congregations had done to advance this proposal, the lack of widespread consultation beyond Europe gave rise to significant consternation on the part of groups who were newly invited to express their concerns. Those opposing adoption of “the French Rule” also were uneasy with utilization of Clare’s Rule adapted for congregations with a history of apostolic works. While for many the outcomes of this assembly were cause for celebration, the unseen discontent soon manifested itself in communications within the order and questions posed to the Congregation for Religious, which at that time was headed by Eduardo Cardinal Pironio. However, the gathering consensus that the project could succeed drove a concerted effort forward.

Grottaferrata, 1980

Wise heads prevailed at this perilous intersection and the BFI, CFI and consultors met in Grottaferrata from March 8-10, 1980. At this meeting a plan to insure the project’s success and directives of the 1979 assembly were elaborated. The elements were:

1. Recognition that, while the French Rule had received majority support in the Assisi Assembly, it was far from being a document that could unite all constituents. Thus, it was agreed to propose that the Madrid Statement and the Dutch Rule (which contained much contemporary insight into renewal processes) should be harmonized with the French text.
2. An additional committee, the International Work Group, was added to the machinery of the CFI. The members were to read, evaluate and accept, edit or discard all suggestions from all respondents. The methodology and working criteria to be used by the CFI and work groups were carefully outlined at the Grottaferrata meeting, as was a time-table leading to an international Assembly in March 1981 in Rome.
3. All TOR congregations would be notified of the status of the project and provided with necessary documentation to assist in the consultation. It was assumed that the consultation would be at the generalate level, but inclusion of all members of the institute was the prerogative of the superiors responsible for answering on behalf of their congregations.
4. Most important, the Grottaferrata leadership saw that the work that had been done in multiple renewal initiatives could be united around four fundamental values that were clearly present in all versions: Conversion/*Metanoia*, Minority, Contemplation and Poverty. These four values were to be the touchstones of an authentic rule document.

Raphael Pazzelli would later note in his commentary edition of the Rule that by the close of the Grottaferrata meeting a “bilateral agreement” was emerging that would strengthen the prospect of success. The two sides of this agreement were implicit in the four decisions listed above. One position involved the institutes that were convinced that a return to ancient penitential sources and promotion of a renewed penitential identity were critical components for a text to be fully adequate. The other position involved institutes whose origins were more directly dependent upon minorite spirituality and modern apostolic categories. These institutes had legitimate concerns about adopting language and mental categories that appeared—at first blush—somewhat foreign to their historical evolution. Given the intensity of debate about authentic and viable forms of *aggiornamento* for religious life raging at the time, these concerns were at the heart of the responsibility accepted by the women and men who, at that precise moment, bore the responsibility for the Order’s future.

Pittsburgh, 1980

Following the 1979 Assisi meeting, European sentiment about content and method was almost unanimous. However, significant disagreements were voiced by the masculine congregations of the Order and by the membership of the Franciscan Federation of the USA. The shared concern was exemplified in an emergency meeting of the national federation (at that point still comprised only of women's congregations) and the leaders of masculine TOR entities resident in the United States. The meeting took place at Millvale, Pennsylvania, in the motherhouse where Mother Viola Lenninger had worked to bring the federation into existence. (The Sisters of St. Francis of Millvale merged with the Sisters of St. Francis of New York in 2007.) Roland Faley, T.O.R., who at that point was the American-born Vicar General of the TORs in Rome, was present as well.⁶

There may well have been other such gatherings to examine the "French Rule" Project that was being proposed as the sole draft for international consideration. Let it suffice to say that at this meeting's close, the leaders of these USA congregations decided to act in cooperation with their European counterparts but on condition that additional time be dedicated to exploring other models for revision of the Rule of 1927 which was, at that point, the canonical Rule of all approved TOR institutes. These women acted with a sincere and educated sense of urgency to preserve the authentic historic patrimony of the Order as they had come to understand it through some fifteen years of dedicated renewal studies. The meeting concluded with the public nomination of Sr. Margaret Carney, OSF (Sisters of St. Francis of the Providence of God) and Fr. Thaddeus Horgan (Franciscan Friars of the Atonement) to the International Work Group. Much was at stake. Much needed to be done and to be dared in order to insure an outcome that would truly unify this vast and disorganized branch of Franciscans.

It should be noted that many national and regional gatherings fanned the flame of interest and desire during these years. The instances are far too numerous to recount here. However, it would be the rare congregation whose members have no memory of participation in wonderful and inspiring assemblies or celebrations of Franciscan identity during this era.

⁶E. Saggau, O.S.F., *A Short History of the Franciscan Federation of the Third Order Regular of Brothers and Sisters of the United States* (Washington, D.C.: The Franciscan Federation, 1995), 8-12.

CFI MEETING

Another meeting of the CFI in June of 1980 developed precise regulations for the first gathering of the International Work Group. The first meeting involved ten representatives from various countries accompanied by four consultants and the CFI members who would link the two units. By this time, Sr. Louise Dendooven, F.M.M., was named the General Secretary of the project. She was a Belgian-born missionary with valuable experience in formation and international cooperation. She was also blessed with an iron will and enormous capacity for intricate, inter-cultural work and dialogue. No one who worked with her over the years of her mandate can doubt that her determination was a major factor in the success of a venture which appeared doomed to fail more than once in the course of the program.

INTERNATIONAL WORK GROUP, REUTE, GERMANY 1980**WORK GROUP MEMBERS:**

Fr. Thaddeus Horgan, S.A.	TOR Masculine Congregations
Sr. Margaret Carney, O.S.F.	United States of America
Sr. Marie-Benoît Lucbernet	Francophone Congregations
Sr. Ignatia Gomez	India/Asia
Sr. Maria Honoria Montalvo	Colombia
Sr. Maria Luiza Piva	Brazil
Sr. Marianne Jungbluth	Germany/Belgium
Sr. Elena Maria Echevarren	Spain
Sr. Isabella Cieri	Italy

CONSULTORS:

Jean-Francois Godet, O.F.M.⁷ (also served as animator/facilitator)
 Jaime Zudaire, O.F.M. Cap.
 Francesco Saverio Pancheri, O.F.M. Conv.
 Tomeu Pastor Oliver, T.O.R.

Reute, 1980

The Reute Meeting was the first encounter of the work group with the CFI and the consultants. It was an intense experience and revealed the powerful tensions at work in the pluralistic TOR world. In spite of the efforts of the BFI and CFI to prepare means to insure good working relationships and results, the outcomes were inconsistent and at times contradictory. However, there was sufficient harmony between and among

⁷Several years after the project, Jean-François Godet accepted a dispensation to return to the secular path of Franciscan life. He subsequently married (adopting the name Godet-Calogeras) and continues his service as a Franciscan teacher and author in the United States.

various propositions that a unified schema was developed after the close of the meeting. This was accomplished by a sub-committee charged with resolving some inherent difficulties that emerged in the intense atmosphere of that ten-day session in a remote corner of Bavaria.

The Work Group followed the instructions to harmonize the three prevailing project drafts. They exhaustively evaluated the proposals that arrived in huge dossiers from some two hundred congregations. They revised and re-drafted until they were numb. A singular problem arose due to unintended consequences of choosing to separate into two language groups. One group of members and experts worked in German-English-French. The second worked in Italian-Portuguese-Spanish. Unfortunately the experts assigned to the different sectors were operating on very different planes of interpretation of primary sources in relationship to this new text. Serious disagreements punctuated the working sessions. When the ten days were over, the group reported to its CFI superiors that it produced two drafts of propositions for articles. There were strong correspondences and identical draft articles for a substantial portion of the proposed rule. However, there were also draft articles emanating from both language circles that could not be successfully merged into a single text accepted by the group as a whole. (This process of voting on each article, chapter, and complete text was wisely demanded by the CFI as a way of confirming the text in a verifiable way.) It came as a shock to all participants that the first Work Group session failed to achieve this fundamental goal. Needless to say, the CFI and its Secretary were unhappy but they were also determined to eliminate the factors that were preventing the Work Group from successful completion of its task.

When the Reute session concluded, the embarrassed and exhausted Work Group members were informed that there would have to be a reconsideration of the methods to be used in the next phase of work. "Go home and wait for word from us." This was the unvarnished and melancholy directive that echoed as we took to the highways and airports following our German encounter. In spite of the difficulties of these days, factors of lived Franciscan *fraternitas* prevailed in the midst of tension. The work of communication in social situations called for extra sensitivity and time. The work of common prayer rotated among the languages and allowed all to savor the songs, symbols and artistry of different cultures with each day's Divine Office or Eucharist. The dedication of religious who cooked, cleaned rooms, typed until their fingers were blue—all of this created a sense of shared purpose in and through painful moments.

Few can appreciate the difficulty of the work load of the ten day meeting. This session was conducted in French without simultaneous translation.

The text had to be redacted in Latin. The work group members represented five language groups: German, Italian, French, Spanish/Portuguese and English. All drafts had to be “tested” in translation into these languages. This work was being done with typewriters and duplication of materials with a single copier. As time went on, the length of the working day extended so that by the close of the session, many were functioning with little sleep with predictable results. However, the members of the CFI who attended the session and shared the work also conveyed a genuine sense of optimism that we “the little ones” of the grand enterprise, could play our part and play it well.

In the weeks that followed, a new sub-committee took the work of the two language groups and managed to create a new draft document. The French Rule gave way to the Reute Draft. This was then circulated world-wide with instructions to provide feedback due by April 15, 1981. A dramatic decision was made to reduce the number of work group members and expert advisors and the consultation progressed with the goal of a second meeting in Belgium.

Additional sessions of BFI and CFI members took place: November 8-9, 1980 in Rome; December 1-2, 1980 at Savona, Italy; February 26-27, 1981 in Montpellier, France. These sessions set the ground rules and recruited personnel for the Rome General Assembly scheduled for March, 1982. In addition to meticulous preparation of norms and agendas, the BFI created a solidarity fund so that no congregation would be denied access to the assembly because of economic need. With amazing speed, given the newness of the work, the elaborate machinery of an historic congress was assembled and the new and tentative relationships of this vast and complex “Order” were being forged in act and intention.

Work Group, Brussels, 1981

Springtime in Brussels found the members of the Work Group and CFI arriving at the house of studies attached to the provincial headquarters of the Belgian friars. Fearing a repeat of the difficulties that plagued the Reute meeting, the CFI had reorganized the membership of both Work Group and consultors, reducing the number in both. At the Reute meetings, a retreat house staff provided multiple domestic support. In Belgium the facility did not have a large staff. Thus, Work Group members shared daily household tasks such as cleaning of dishes and assistance with other household duties. This simple necessity created an environment that was conducive to developing elementary human relationships in a new key. Sr. Louise Dendooven, accompanied by Sr. Bernadette Nor-

din and the faithful translators of the Work Group,⁸ made clear that a simplified process for the work was being inaugurated and that this action signified a confidence that the group's resources were equal to the daunting task. Gone was the negatively charged air of the last days in Reute. A new fraternal ambience emerged and work, still hard and relentless, went forward quickly.

Two hundred and five congregations submitted revisions to the Reute draft. Each revision had to be evaluated. New schemata were developed for each article and chapter. A draft translation into the five⁹ languages was a constant. Finally, after ten days of intense exchange, reflection and attention to the consultation documents, a single text emerged that the Work Group members unanimously approved by formal votation. During this same ten day period, an assassin tried to kill John Paul II and the turning pages of history confronted the project leaders, reminding them of the contingencies of our lives and plans and linking them back to the early Franciscans for whom papal approval of their Rule was the high point of the movement's youthful expansion.

The members of the BFI attended the final session of the Brussels meeting on May 21-22. They reviewed the work on the new draft and concluded that they could confidently place this draft in the hands of the TOR superiors. While certain choices made by the Work Group in redacting the text caused discussion and concern, the Work Group's method and exegesis finally received enthusiastic approval from the members of the Bureau. So enthusiastic was the reception that the BFI decided to increase the role for the Work Group members in the Rome assembly. The original Assembly program placed the Work Group function behind the scenes to do further editing. The BFI members now realized that the presentation of the draft could best be done by these authors. It was a stunning change in plans. To that point, all parties assumed that the primary presentations of the Rome assembly would be done by internationally recognized Franciscan scholars or elected leaders. Now, the Work Group would be placed on center stage, charged with explaining the text, but also expected to communicate the extraordinary experience that resulted in the unity of the Brussels experience.

In the last hours of the session a hasty decision was made to convene the Work Group members for a third session. This time the task would be to prepare the presentations needed for the Assembly. There would

⁸Translation was done by a team of volunteers, mostly sisters, who worked one-on-one with Work Group members and others in the CFI or BFI who might need their assistance. Translation equipment was used only in the general assemblies.

⁹While six languages were in use in the group, the assembly program operated in five languages with Portuguese being dependent on the Spanish translation for most of the work.

be four papers on the four fundamental values and exegetical presentations on each chapter. The members would also be present at all plenary sessions to respond to questions and to hear proposals for further amendment. With little time left to prepare and calendars already full of commitments, the members decided to dedicate their Christmas holidays to this task. This was also a commitment to share a beloved feast together—a sign of the new and vibrant solidarity that was born in the days of work on the text.

Work Group, Oyster Bay, NY, 1981/82

The BFI/CFI accepted a request to schedule this final Work Group session in the United States. Subsequently the Franciscan Brothers of Brooklyn offered to host the session at their retreat house in Oyster Bay, Long Island. Quiet and memorable hours were shared around a Christmas tree and then the work was taken up again. This time, the nervous anxiety of the group was pronounced. Accustomed to working behind the scenes while BFI and CFI members led the public proceedings, the members faced a daunting challenge as they absorbed the responsibility placed upon them. Several were inexperienced to public speaking, and even those who had experience felt trepidation at the thought of addressing so historic a gathering. Two members had recently suffered significant health crises and the long days of preparatory work took further tolls. Some of the Work Group's requests to alter the proposed schedule of presentations in the assembly schedule caused further anxious exchanges. As the week closed, a New Year's celebration attended by dozens of Franciscans from the New York area brought a break in the work and lightened the tension with a dose of New Year's revelry that included exquisite French champagne presented as a gift from the BFI. The hospitality of the American Franciscans, particularly that of the Brothers of Brooklyn, put to rest any doubts that earlier difficulties about the Rule Project might prevent enthusiastic collaboration on both sides of the Atlantic. As the text became refined and the matrix of its first commentary was written, the fundamental relationships that would support a new international identity for the Order were also being forged.

General Assembly, Rome, March 1-10, 1982

The program for the General Assembly exhibited the BFI's concern for legitimate processes that would lead to ratification by carefully elaborated stages and constant monitoring of the voting process. All was developed to provide maximum participation by the superiors in attendance. A series of plenary assemblies and small language group exchanges made up the daily regimen. Three types of votes gradually brought about the hoped-for consensus:

1. A straw vote followed the presentation of each chapter. Proposals for change would then be handed over to the Work Group for redaction;
2. Orientation votes on the basic text with its proposed amendments required a two third majority for text or amendments to go forward;
3. A final deliberative vote on each article and each chapter were required for the parts of the text that did not receive the two-thirds approval in the orientation voting.

The Assembly concluded the votation on the text on March 8th and only two votes prevented the final ballot from being a unanimous approbation of the proposed Rule and Life. The Assembly had, over the course of the week, come to incorporate only seven changes to the basic text. These changes reflected careful study and vigorous exchange among the participants. Several key areas of tension or misunderstanding that had previously dominated the debate on the project were resolved by the painstaking work presented by BFI, CFI and Work Group members. A private audience with John Paul II occurred mid-program. Just as dramatic was the arrival in the Assembly, two days after its start, of two sisters from Poland. The crackdown on Solidarity by military intervention was in full swing. These courageous women managed, in spite of the fragile situation in their homeland, to make the journey. As they entered the aula, a respectful hush fell over the membership. Ashen-faced and solemn, these sisters took their place close to the Work Group. Their determination was a dramatic witness to the life-changing importance of what was transpiring at the *Domus Pacis* in those days. The text is usually referred to simply as “the Rule.” But here, again, participants were reminded that it is a Rule and Life—and that it is the life that is the ultimate bull of approbation in a life governed by the workings of the Spirit of the Lord.

Approbation of the Text

On December 17, 1982, Cardinal Pironio, Prefect for the Congregation of Religious and Secular Institutes, presented the text *Regula et Vita Fratrum et Sororum Tertii Ordinis Sancti Francisci* to Pope John Paul II. By the time the text reached the pontiff’s desk, an important modification had been made. A chapter on chastity composed of articles written by German scholar-friar, Lothar Hardick, O.F.M. had been added. The Cardinal requested the Pontiff’s approval and the assignment of the date of December 8th, feast of the Immaculate Conception, to the letter of approbation.

On April 21 of the following year, Cardinal Edward Martines Somalo, Substitute of the Secretary of State, sent a letter containing the papal brief, *Franciscanum Vitae Propositum*, the confirmation of the Rule. On April 30th, Cardinal Pironio sent copies of both the brief of John Paul II and the accompanying letter of Cardinal Somalo to the BFI. Notification had already been provided, according to Roman protocol, to the Minister General of the friars of the Third Order Regular.

The news gradually made its way to the generalates of the Order and a new era for this branch of the Franciscan family began.

The 1982 centenary of the birth of St. Francis of Assisi was filled with opportunities for members of the family to cross the lines of institutional separation and enjoy a wonderful year long celebration of united vision and hope. Indeed, the birthday celebrations of that year marked the culmination of several major projects and works that contributed enormously to a new shared identity. In addition to the approbation of the Third Order Rule, the publication in English of the Paulist Press volume *Francis and Clare: The Complete Works*, initially edited by Ignatius Brady, O.F.M. and completed by Regis Armstrong, O.F.M. Cap., was a singular event that typifies the ground being broken at the time. This volume provided, for the first time, an authoritative translation of the principal sources for both saints in a form that made it the standard text for the next twenty years.

PART TWO: THE PATH OF PENANCE AND THE MAKING OF PEACE

AREAS OF CONFLICT AND CONFUSION

In the foregoing description of the Rule Project, indications of serious tensions and misunderstanding abound. In order to better understand the text and the significance of much of its content, it is important to know the content of these tensions and to have some idea of how they were resolved. The following material has that purpose.

Lack of Formal TOR Structure

Here, the hindsight of a twenty-five year experience is helpful. If one looks back to descriptions of the growing friction between advocates of different methods for renewing the TOR rule at that time, several partial explanations for serious difficulties can be identified. One is the lack of structural unity within a vast Order whose member congregations ranged from small “experimental” communities of less than a dozen members to large, well organized multi-national congregations with decades of strong leadership. These latter were often well connected to the authorities of the Friars Minor and close to the Vatican by geography and history.

*Affiliations with First Order*¹⁰

The ties to the First Order were themselves sometimes part of the friction. Generals of the different branches could act (or refuse to act) in ways that had direct bearing on the deliberations of TOR generals meeting in assemblies and task forces. Since many congregations of women depended literally on First Order authorities to represent their interests to the Vatican or to protect their works in fragile situations of mission, there was sincere desire to avoid any action that might be seen as ungrateful for this patronage or willingness to exchange it for a new identity that stressed autonomy for the TOR too loudly.

Given the affiliations between many TOR women's groups and the Friars Minor the existence of congregations of Third Order Regular friars and brothers was news to some. For example, in France where so much work had been done on a new text, the existence of TOR friars was unknown. There was only one very small house of this branch of friars in Paris. The TOR men were thus "invisible" to the Francophone sisters. Others, while a distinct minority, enjoyed close association, even formal aggregation, with the Third Order Regular friars. Thus, there was a clear note of ambivalence and anxiety about the proceedings of the Assembly and some of the debates about the text's content. Looking back, it is easy to understand that many congregations of women were understandably reluctant to over-identify with the Third Order Regular lest that be interpreted as mitigating their historic ties to the First Order. On the other hand, those whose relationships to the TOR friars were strong were mystified at times by the attitudes of others.

It is fortunate that part of the era of post-counciliar renewal included inter-jurisdictional commissions or meetings that brought the generals of all four groups of friars together regularly. Their mutual respect and experience of cooperation allowed them to define ways of relating to the Rule Project that resulted in steady forward movement and final resolution of these problems.¹¹

Nationalism

Nationalism and cross-cultural problems could and did play out even in Franciscan working meetings. Bias that was rooted in one's national

¹⁰R. Pazzelli, T.O.R., *The Franciscan Sisters: Outlines of History and Spirituality*, trans. Aiden Mullaney, T.O.R. (Steubenville, OH: University Press, 1993), 197-99. This book also contains a helpful summary of the Rule Project assemblies and key meetings, 183-99.

¹¹P. McMullen, T.O.R., *The Development of the New Third Order Regular Rule* (Loretto, PA: St. Francis College, 1986). In this M.A. thesis, Paul McMullen details the entire project from the perspective of the TOR friars. Paul served in the General Curia of the TORs in Rome during this period and served as staff to the Madrid meeting of 1974.

history could easily enter into one's perceptions of others coming to the table of international deliberation and debate. These emerging lines of disagreement about method and content were, for the most part, carried on between leaders of Europe and the U.S.A. whose general superiors were the most numerous participants in the international assemblies. It was generally assumed that these superiors represented sufficient international expertise as they normally came from congregations with missions on almost every continent. However, at a period in which the Church was being confronted by the demand to see life from the vantage point of the world's *comunidade de base*, or base communities, as they were called, the small number of native leaders from Latin America, Asia and Africa was increasingly apparent. It may be safely said that consciousness of the problem was more acute than constructions of solutions. However, events subsequent to the passage of the Rule text would begin to bring solutions forward in helpful ways.

Scholarly Biases

Finally, even one's positions in regard to contemporary scholarship and interpretation might result in serious disagreement. Those most familiar with newly published theories about Francis's real intentions, the nature of his writings, the historic accuracy of his biographies, were defensive when asked to look from other frames of reference at their assumptions and convictions. Along with the ubiquitous "Franciscan Question" pondered by every serious student of Franciscan history stood the question of whether or not Francis intended to found what is presently subsumed under the banner of the Third Order Regular. While in scholarly circles this was a minor but contentious motif of classroom and "rec" room debate, Third Order Franciscans were finding a voice and asserting a right to be classified as equal in vocation and dignity with the members of the First and Second Orders. Acknowledgment of the rightness of the claim was not always swift in coming and arguments forged by prominent historians could and did lose sight of the existential fact: Third Order Franciscans were living a complete and authentic Franciscan life in the present and were not about to assume a second class status within the family that they loved and served by their daily lives.

The TOR Rule, whose papally-affirmed status spanned the centuries from 1289 to 1927, was a centuries old cord of connection that rooted the members in a solid lineage even if its historical documentation left much to be desired. Since consistent attention to the sources for the history and spiritual legacy of the TOR tended to be unevenly incorporated into the curricula of major Franciscan study centers, it is also fair to say that members of this branch themselves are often ignorant of the "long and winding road" by which their contemporary inheritance could be

validated. Since the vast majority of institutes are modern foundations, lacking a “blood line” back to the earliest Franciscan penitential communities, a commitment to study and preserve this historic consciousness has been in short supply. Happily, the years since the Rule’s approval have seen a steady advance in our knowledge, much of it developed by lay scholars. However, there is room for a great deal of research and teaching on this topic. It will be particularly important for this work to be exported to developing nations were the Order sees wonderful growth and a promising future.

POSTSCRIPT: PEACE AND GOOD

The Franciscan greeting of peace is often accompanied by the wish for “good.” It is a quaint way of speaking but conveys a profound belief of Francis and Clare that the nature of God’s action in the world is best characterized in one word: good. This is the word that summarizes the activity of each day of creation in Genesis. This is the word used by Bonaventure to describe the inner life of the Trinity. One might be tempted to write the story of this Rule in terms of the trials and tribulations of its authors, the leaders of BFI and CFI and (were we to have access to their diaries!) the leaders of the First Order and certain curial officials as well. There is precedent for this as Franciscan history loves a lurid tale and is punctuated by sad chronicles of brothers rising up against brothers and the quest to live the Franciscan rule. Alas, the followers of the Poverello have their dark chronicles of murder and mayhem, much as they hate to admit it. (Thank God the Rule Project had no murders to recount, but more than one hour of mayhem is remembered by those who were at its center of gravity!)

It is thus very important to write this story as a chronicle of grace. The Order bears the ancient name, The Order of Penance. Much has been done to “excavate” the rich biblical, liturgical and social meaning of this term so central to the self-understanding of today’s Third Order members. The call of *penance* is a call to continual conversion. This central understanding was not simply a theoretical template for discussion through the years of work on the 1982 Rule. The lived experience of constant readiness to stand under the correction of the Spirit was the prevailing spiritual experience of all who took part in this chapter in Franciscan history. The justice and judgment of the Spirit expressed itself in manifold ways. At times it took the form of discovery of an historical fact. At times it appeared in the painful dialogue that resulted in new consensus. At times it appeared when cross-cultural bias gave way to new mutual respect. Many times it took the form of long days and nights of difficult work in Spartan conditions, work done by unsung

secretaries, translators, office helpers whose names are already lost with the turning of the pages of the story.

Breaking bread together became the nourishment of a new penitential consciousness. In the first place, the members of the various bodies committed themselves to lengthy meetings often held in remote locations. This required travel from one's home base, spending prolonged time together and sharing the rhythm of days of work, meals, recreational diversions, and prayer. Even when tensions were rife, meals and evening periods of relaxation became oases for normal human exchanges. Away from the formal process of translators and mediated committee meetings, the task of sharing table conversation, a joke by the fireside in the evening, a song, a walk to explore nearby sights—all required multiple levels of communication. This put the polyglots to the test and often resulted in hilarious moments. Each sister and brother came bearing the hopes not of a single congregation but, at times, of whole nations. Each came also with personal history and personal *legenda* of living the rule and life handed down for eight centuries. The normal tapestries of family sorrows and joys, health problems and ministerial stresses were part of the exchange as profound friendships germinated out of the soil of such demanding work.

Breaking bread in the form of prayer and worship mirrored the nights and days of dining room encounters. No matter how grievous the discord, no matter how wounded the psyche, no matter how uncertain the opinion of the day's results, the call to join in the liturgy of the hours or the Eucharist provided deep encounter in the Giver of all good gifts. Perhaps none was more poignant than the Christmas Mass celebrated in the small chapel of Oyster Bay. There, without benefit of great choirs and orchestral support, this band of pilgrim authors agreed at one point to simply sing "Silent Night" in all their native languages simultaneously. The result was magical. One harmony out of many tongues rose in the incense-sweetened air that night. It heralded possibilities of a new international penitential brotherhood and sisterhood whose penance was nothing less than a total commitment to be turned to God and turned to neighbor in a life-long covenant of Franciscan evangelical striving.

Is it possible that what was vouchsafed to this group of pioneering sisters and brothers was a taste of the earliest generation's struggles and searching? Their text emerged from a *sacrum commercium*—a sacred exchange of desires, commitments, and prophetic convictions. Aided by technology and the speed and ease of modern travel, a world-wide federation of Franciscan men and women were doing the work that once was done in the hermitages and marketplace ministries of the first Franciscans. And what was that? It was simply the search for a way to simply and in a few words distill the burden and beatitude of being called to

walk in the footprints of Jesus the Christ. Out of the short span of years in which all of these were engaged in the rule project's demands arose a new chapter in Franciscan history and new cross-cultural set of structures and options that would build upon this foundation. For these men and women, the blessing invoked in the Early Rule of Francis himself became a text of immediate experience, of beatitude.

IN THE NAME OF THE LORD!

I ask all my brothers [and sisters] to learn and frequently call to mind
the tenor and sense of what has been written in this life
for the salvation of our souls. I beg God, Who is All-powerful,
Three and One, to bless all who teach, learn, retain, remember,
and put into practice these things, each time they repeat and do
what has been written here for the salvation of our souls, and,
kissing their feet, I implore everyone to keep,
and treasure them greatly.¹²

¹²ER XXIV:1-3; FA:ED I, 86.

“WHO’S WHO” IN THE RULE PROJECT**BFI: International Franciscan Bureau**

Function:	Acts as Board of Directors representing major superiors
Members:	Sr. Elizabeth Delor, O.S.F. — President Sr. Giovanna Achille, F.A. Sr. Alma Dufault, F.M.M. Sr. Eliska Pretschnerova, O.S.F. Sr. Christianne Wittmers, O.S.F. Br. Luis Cuesta Y Nozal, T.O.R. Cap.
Coordinator	Sr. Louise Dendooven, F.M.M.
Facilitator	Fr. Frédéric Deblock, O.F.M.

CFI: International Franciscan Commission

Function:	Acts as “manager” of the Rule Project; directs meeting plans, rules for procedure, etc.
Members:	Sr. Carmen Ciria, F.S.S.S. Sr. Roberta Cusack, O.S.F. Sr. Marie Andrea Frech, S.S.F. Sr. Ethelburga Hacker, D.F.S. Sr. Bernadette Nourdin, S.S.F.A. — Secretary Sr. Romualda Trinchera, F.M.I.H. Sr. Augusta Vinsentin, F.M.S.H. Br. Columban Keller, C.M.S.F.
Coordinator:	Sr. Louise Dendooven, F.M.M.
Facilitator:	Fr. Frédéric Deblock, O.F.M.

Consultors: Representative of Superiors of OFM, OFM Cap., OFM Conv., TOR

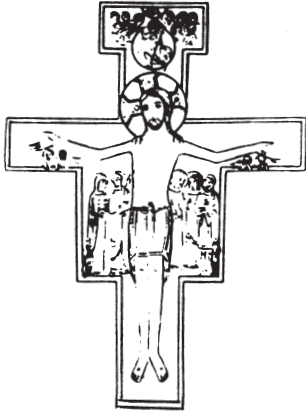
Function:	Communications liaison with First Order, experts in Franciscanism
Members:	Fr. Bernardin Beck, O.F.M. Fr. Fidèle Lenaerts, O.F.M. Cap. Fr. Candido Lorenzoni, O.F.M. Conv. Fr. Raffaele Pazzelli, T.O.R.

Work Group: Authors, Editors of Rule Text

Function: Compose text based on results of consultation; amend during the General Assembly of Rome

Members: Sr. Margaret Carney, O.S.F.
Fr. Thaddeus Horgan, S.A.
Sr. Ignatia Gomez, M.S.A.
Sr. Marianne Jungbluth, O.S.F.
Sr. Marie-Benoit Lucbernet, S.S.F.A.
Sr. Maria Luiza Piva, C.F.
Sr. Maria Honoria Montalvo, F.M.I.

Facilitator Br. Jean François Godet, O.F.M.



THE RULE PROJECT

Metanoia and Mercy

***“Whoever will observe these things shall be filled
with the blessing of the most high Father in heaven,
and on earth with the blessing of the beloved Son,
with the Holy Spirit,
and with all virtues
and with all the saints.***

***And I, Brother Francis, your little servant,
in so far as I am able,
confirm to you within and without
this most holy blessing.”***

Testament 40-41; TOR Rule 9:32

1967- “French Document ... Dutch Rule ... **1969** - “Go To My Brethren” (USA) ... **1974** - “Madrid Statement” ... **1976** - Creation of International Franciscan Bureau (BFI) for supervision of a revised Rule ... **1979** - Assisi Congress: creation of International Franciscan Commission (CFI): nine-members for the organization of the Rule Project ... **1980** - naming of the “Working Group” of nine members from eight countries (Margaret Carney OSF and Thaddeus Horgan SA for the USA) ... **September, 1980** - Reute, Germany (new Rule draft written) ... **April, 1981** - Washington D.C., Franciscan Federation Research Committee processes American response to Reute Draft (59 of the 73 congregations represented by the Federation responded) ... **May 1981** - Brussels: new revision formulated ... **August, 1981** - Indianapolis IN: Federation Annual Conference (AFC), Margaret and Thaddeus present Brussels Draft... **March 1-10, 1982-** Rome General Assembly of 200 Major Superiors from around the world - approval of Rule by a vote of 188- 2 ... **April 30, 1983** ... Pope John Paul II confirms Rule in the Brief, *Franciscanum vitae propositum* with papal approval dated **December 8, 1982** ... **October, 1985** - *First Assembly* of the new International Franciscan Conference (IFC) held in Assisi.

***“The spirit of an Order has been referred to as its soul;
it is what informs it,
gives life to it and all its elements,
giving it a distinctive character.***

***Living a Tertiary spirituality is a particular way of living Franciscanism.
Our Rule is our common bond as Franciscans reminding us of our spiritual heritage.
This must ever be in our lives - a dynamic force.”***

James Mungovan OSF - General Minister, Brothers of the TOR of Penance, Ireland



“The French Document”
Franciscan Sisters of Apostolic Life

“By their whole-hearted observance of the commandments and loving practice of God’s counsels the sisters will proclaim the goodness of God and extol God in all they do.” [9.32]

- Begun in 1976 and published in 1972, this Rule arose from the meetings of Major Superiors and Novice Directors of 25 congregations of Franciscan women in France and French-speaking Belgium.
- Under the direction of the Friars Minor and the Capuchins, the French Document emerged as the most prominent among the various statements proposed on the new Rule and it becomes the “Working Document.”
- Addressed to “Sisters” only, this Document was mostly an adaptation of Francis’ Rule of 1223 and thus it did not completely represent the entire Order; nor, did it address the penitential spirituality of the T.O.R. charism.



“The Dutch Rule”

*“To all who believe in Christ, the gospel is the first and highest rule of life and love is the summation of the law ...
This imitation of Christ binds us together into a community of Sisters and Brothers. Each one is personally called to this; bears responsibility for the whole, and has his or her particular worth and personal task ... according to the Gospel, proposed to us in particular by St. Francis.”*

- Published in 1967 as the work of 19 congregations of Dutch origin, this Rule presented the Franciscan identity for clarity among the whole Church in Vatican II language.
- This “Holland Draft” did address both the Brothers and the Sisters.

“Go To My Brethren”

A Spiritual Document for Apostolic Communities of Franciscan Women in USA



*“Bound together with Francis in a professed attachment to Christ, to the Gospel way of life and to our companions in this call, we will continue to create the Franciscan mission as we search for its meaning... The Franciscan is called to experience the indescribable self-giving of Love poured out in Christ Jesus... Like the sign of the ‘Tau’ by which Francis wanted his brethren to be known, his family continues to be a remnant elected to a prophetic covenant of faith. Their conversion to life in the spirit brings a faith marked by: **poverty, penance of realized obedience, gospel brotherhood/ sisterhood, prayer, and peace.**”*

- Commissioned by the Franciscan Federation in 1969, this Spiritual Document was based on the Sources used for the re-discovery of the Penitential Charism; most especially Francis’ *Letter to The Faithful* and *“The Testament.”*
- As a non-juridical presentation of Franciscan principles, this document was seen as a possible springboard for the practical work of writing constitutions.

“The Madrid Statement”

“A Statement of Understanding of Franciscan Penitential Life”



*“With a joyful spirit and with undivided hearts the sisters and brothers are freed for a universal love expressed in a life of conversion and dedication to God and work among the People of God [1Cor7:32-35; L.G.42].
Let them especially bring to those in sorrow the joy of God and to broken humanity the healing of Christ.[L.G.46] The friars and sisters of this Order of Penance are called to be messengers of peace ... They are to share each other’s sorrows and joys and by prayer and work are to support one another in fraternity as an expression of their love.” Chapters 3:7;5:14-15; 6:18*

- In 1973 Thaddeus Horgan S.A. and Roland Faley T.O.R. composed the initial document, and presented it to the Fourth Franciscan Tertiary Interobediential Congress in Madrid, Spain in 1974. **Decision:** need for a new T.O.R. Rule that would express the Franciscan *Tertiary* charism of penance and *metanoia*.
- The “Madrid Statement” is translated into Italian, Spanish and German and becomes “A position paper, an interim step towards a new rule” (Louis Secondo T.O.R. - Minister General)
- A Study Guide on the Madrid Statement is compiled and edited by Rose Margaret Delaney SFP and Thaddeus Horgan S.A. and published in 1974 by the Franciscan Federation.
- The Document offers a clear notion of *penance* in the biblical concept of *metanoia* or ongoing conversion while it also accents the witness of life as Franciscans in being messengers of peace and reconciliation. It gives expression to continuous conversion as that of a grateful response of a joyful heart to an All-Good God.

International Franciscan Bureau, 1976

In 1976, given the energy and presence of all the various Documents, Statements, and Rule Drafts after Vatican II, a new Organization was created in Western Europe to communicate with the more than four hundred different congregations and monasteries belonging to the T.O.R. tradition. The **goal** of this communication was the *approval of a NEW TEXT for the ancient Rule* that would incorporate:

- * A post-conciliar theological perspective and
- * the riches of recently re-discovered Franciscan sources.

June, 1980 - International Franciscan Commission(CFI): Assisi

- The “**Work Group**” appointed for the actual writing of the Rule:
 - S.Isabella Ciruzzi, *Italy*
 - S.Elena Echavarren, *Spain*
 - S.Ignatia Gomez M.S., *India*
 - S.Marianne Jungbluth F.H.S., *Germany*
 - S.Marie Benoit Lucbernet S.F., *France*



“Work Group” continued

- S.Margaret Carney O.S.F., *United States*
- Thaddeus Horgan S.A., *United States*
- S.Maria Luiza Piva C.F., *Brazil*
- S.Honorata Montalvo F.M.I., *Colombia*

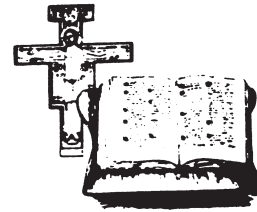


Work Group Members await the papal audience in Clementine Hall at the Vatican, March, 1982. l to r: S.Odette Huron, translator; Honorata Montalvo FMI, Margaret Carney OSF, Jean-Francois Godet OFM, animator; Thaddeus Horgan S.A., Marie Benoit Luebernet SF, Maria Luiza Piva CF, and Marianne Jungbluth.

September, 1980 - REUTE DRAFT of RULE

The first of three major Drafts of the Rule

- Work on this FIRST Draft demonstrated a deep desire for unity and for carrying out the Work Group’s common responsibility to the Franciscan Family as well as the desire to bridge cultural barriers.
- Decision made at Reute to cast the Rule in the words of *Francis* himself and to make adequate use of *contemporary* Franciscan scholarship in the use of the primary texts.



REUTE DRAFT continued ...

- The Reute Rule experience addressed several needs:
 - For careful study of the role that aggregation to a male branch of the Franciscan Family has played in the formation of the *identity* of women's congregations;
 - To grapple with the cultural and linguistic differences of the various nations;
 - To wrestle with the differences in history, method, and conviction about T.O.R. Identity;
 - For a clearer grasp of what *penance* as a way of life meant to Francis and Clare.

- Decisions were made to:
 - Use the structure of Francis' **1223 Rule** for style and sequence;
 - Consider Francis' **Testament** as a model for the work since it begins with what many recognize as the *propria indolis* of the Third Order Regular, "*The Lord granted me, Brother Francis, to begin to do penance in this way ...*"
 - Honor the primacy of *metanoia* as a specific characteristic of this gospel response while also emphasizing the mutuality of Franciscan spirit and life which the T.O.R. sisters and brothers share with the Friars Minor of all branches, the Poor Clares, and the Secular Franciscans.

"A Note of Gratitude"

"Report from Reute, September 21, 1980"

From: Sister Margaret Carney OSF

To: Members of the Council of the Franciscan Federation, USA

"Before concluding this report I would like to express my *thanks* to you for the privilege of being your representative. The meeting was physically and psychologically demanding, but like any gathering of true Franciscans it held its own abundance of blessings. I also want to acknowledge the *great support given to me in this role by Thaddeus Horgan. His impact upon the proceedings in Reute cannot be overestimated. By reason of his role in the authoring of the Madrid Statement and his facility with languages he played a crucial part in bridging many gaps. He eased my way in many situations in which communications were cumbersome and supported my interventions - as I did his - in every way possible.*"

SOURCES: "Towards A New Rule for Tertiary Franciscan Religious? - Thaddeus Horgan S.A. **The CORD**, January, 1981.pp.10-15.

"Problems and Possibilities: The Third Order Rule in Progress" - Margaret Carney OSF and Thaddeus Horgan S.A., **The CORD**, June, 1981. Pp.164-170.

May 10-20, 1981 - BRUSSELS DRAFT of RULE
The second of three major Drafts of the Rule



- The purpose of this Meeting was the collation of responses to the **Reute Draft** of the Rule, and continuing work toward a final version of the new Rule. Two hundred and eight congregations, sixteen provinces of international congregations, and the research committees of the American and Great Britain Federations responded. These returns represented thirty countries in ten languages. With *approval given by 105* Congregations from a possible 430 T.O.R. groups worldwide, *this was the most extensive collaborative effort ever undertaken in the entire history of the Order.*
- The new *Brussels Text* made greater use of Francis' 1221 Rule as well as the Letter to The Faithful I and II. It was written almost entirely in the words of Francis, and as such was a *radical departure from all past Rules.*
- As a result of the extensive collaboration, convictions among the Work Group emerged that the *four primary characteristics of the charism of Francis* that should be foundational for the revised Rule are: **penance (metanoia), prayer, poverty and minority.**
- This *Brussels Draft* was presented to the Major Superiors at the Annual Federation Conference (AFC) in Marian College, Indianapolis IN, August 22-23, 1981 by *Margaret Carney OSF, Thaddeus Horgan SA, Roberta Cusack OSF and Ann Carville OSF.* It was at this same conference that a sixteen-year tradition was *changed*, and the Franciscan Federation welcomed all the *friars* of the Third Order Regular tradition as members.

March 1-10, 1982 - ROME ASSEMBLY
The last of the three major Drafts on the Rule

- Nearly two-hundred Superiors General (of approximately 430) participated in this Assembly. These sisters and brothers represented thirty-seven countries and five continents: nearly 200,000 Franciscan Tertiary Religious.

Rome Assembly continued:

- The Members of the “Work Group” gave presentations on *contemplation, poverty, minority and conversion*. They prepared outlines of the **content** of each Chapter in the proposed text from which the participant, meeting in *language groups*, studied and proposed amendments.
- The **Rome Draft** was approved by the Superiors General - **188-2!** Following the vote the entire Assembly was received in a private audience by Pope John Paul II and Cardinal Pironio, Prefect for the Sacred Congregation.
- Once presented to the Sacred Congregation for Religious and Secular Institutes (SCRIS) the only change made was the addition of Chapter Four, articles 14-17 on *Life of Chastity for the Sake of The Kingdom*. Lothar Hardick OFM of Germany was instrumental in writing this chapter. Following the example of Francis in his Rules, the “Work Group” had chosen not to create a special Chapter on Chastity but rather to weave the understanding of this Vow throughout the Rule.
- On **April 30, 1983** Cardinal Pironio informed the **Sisters and Brothers of the Third Order Regular** of the papal approval of the new Rule with the Brief, *Franciscanum Vitae Propositum*. to be dated **December 8, 1982**. The Members of the International Franciscan Bureau (BFI) received the word, “*We receive it, confirmed by the Pope, as a precious gift, an inestimable treasure entrusted to our fidelity*” **May 11, 1983**.
- In the September 14, 1983 USA Commentary to the new Rule, **Margaret Carney OSF** writes, “*The new Rule engenders renewed life. It gathers us in a new place between the monuments of our past and the horizon of the future towards which we move in alternating passages of light and dark. Our Amen! To this Rule binds us together for a new stage of the pilgrimage of penance and peacemaking in our time,*”

Sources: Carney, Margaret OSF. “The Proposed Third Order Rule: Information to Reformation” Editorial. **The Editorial. The CORD** 32.9 (1982): 257-58.

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Resources for the Study of The TOR Rule. Washington, DC Franciscan Federation, 1994.



“A New Stimulus for a Life of Generosity”

Edward Cardinal Pironio, Prefect SCRIS. 4.30.83



The audience with Pope John Paul II in Clementine Hall at the Vatican - March 1982, for the members of the Rome Assembly which approved the new T.O.R. Rule.

“While they were going along the way, they talked with one another about the number and the quality of the gifts the most kind God had bestowed upon them, and about how they had been received most kindly by the vicar of Christ.

*About how they might be able to fulfill his counsels and directives;
About how they could sincerely observe the rule they had taken upon themselves and keep it without failure;*

*About how they should walk in all goodness and reverence before the Most High,
And finally, about how their life and conduct might be an example to their neighbors by an increase of holy virtues.”*

1Cel XIV:34

The CORD 42:9 (1992)

Guest Editorial

Genesis . . . The 1982 Rule — a personal remembrance

ROLAND J. FALEY, T.O.R.

It is hard to believe that a decade has passed since the present pope approved the new **Rule of the Franciscan Third Order Regular** on December 8, 1982. It is even more difficult for some of us to remember that the Rule's inception began for members of the Third Order Regular family ten years before that. I was privileged to be part of that from the start.

To pinpoint an actual date is not easy twenty years after the fact. I remember the first conversations taking place in my office in Rome on a beautiful fall day in 1972. It was a highly theoretical, unfocused talk between Thaddeus Horgan, S.A. and myself about the inadequacy of the 1927 Rule in the light of the Council and all the work that had been done subsequently on the T.O.R. charism.

Roland Faley was Minister General of the Third Order Regular Friars at the time of the writing of the new Rule. His biblical scholarship on *metanoia* and his study of the 800 year tradition of Francis' Third Order led to the Order's self-understanding as modern day penitents.

Presently, Roland is Spiritual Director for the religious and clerics of the diocese of Austin, Texas. His new book **FOOTPRINTS ON THE MOUNTAIN, Preaching and Teaching The Sunday Readings** will be published by Paulist Press at Christmas time.

In both of our communities, the work of revising constitutions had already begun and we regretted the absence of a strong basic document, owned by all Tertiaries, to give direction to the work of revision. We ruminated aloud about the possibilities of revising the Rule, the alleged sacred and untouchable character of which remained an almost undiscussed given. We had no idea of what the possibilities were. But with the undaunted and mindless courage of youth (certainly true at the time!), we decided to test the waters and attempt a revision of the Rule. Our task was gargantuan, of course, in light of the fact that several hundred congregations of Franciscans followed the Rule. Moreover, the greater number of these were women.

Nonetheless we began work in earnest in 1973 to produce the first draft of a new Rule based on the Order's largely rediscovered charism, conversion of life or *metanoia*. Since the congregations with which we had an historical and direct contact were the male communities, we first wanted to measure their reaction to the initiative. The men had their own organization, known as the Inter-obediential Congress, which had met periodically over the past twenty year period. Therefore, we had a structure in place through which to work. The men and women had no history of a joint organization wherein common issues were addressed. During the generalate of Louis Secondo, T.O.R., after consultation with the other men's communities, it was decided to hold another international meeting to explore the possibility of a revised Rule. There was a unanimous consensus around the idea. The meeting was set for April, 1974, in Madrid, Spain. For the first time, representatives of women's congregations were asked to join us. The enthusiastic reception which the whole idea evoked was most encouraging.

In the meantime Thaddeus and I, with the help of valuable experts in matters Franciscan, worked on the draft to be presented for consideration in Madrid. The document was wholly centered around the conversion theme; the vows were seen as an expression of conversion. There was the earnest effort to remain true to Francis' own vision as expressed in his writings, as well as the best values found in the various revisions of the Rule through history. The Madrid Congress took the draft article by article, made its own recommendations, and then gave the final version its approval. This became known as the **Madrid Statement**, which circulated widely in the Franciscan Tertiary world during the next decade. Many communities included it with their revised constitutions as an expression of charism.

As encouraging as all of this was, we were still far from a revised Rule. Little did we realize at the time how far away we were. There were

landmines in abundance on the terrain still to be traveled. It became evident as work on the **Madrid Statement** progressed that other Franciscan bodies, in particular countries, had already launched their own initiatives to revise the Rule. Efforts were well underway in France, Germany and Holland. The most prominent of these, the French undertaking, was much further ahead than we. By the mid-1970's, the Tertiary congregations in France and many in Italy had lined up in support of this Rule project, which was written for women only.

We realized that to continue along separate tracks, without bringing these initiatives together, could be disastrous by ultimately splintering a centuries-old unity around a single Rule. It would be even worse if the division were along lines of gender. The Vatican had indicated that a joint undertaking should be pursued. Yet all of this was more easily said than done. We were no longer at the beginning stage. Much work had already been done and approved on both sides. After much thought, a new collaborative effort was seen as essential, one to be marked by diplomatic expertise as much as by history or theology.

At this point there were only two main contenders for Rule revision: the French document, intended only for women, and marked by strong Minorite leanings; and the **Madrid Statement**, intended for women and men, and focused mainly on the tertiary or Penitential charism. The French work had been remarkably well done, with great fidelity to Franciscan sources and largely drawing on the words of Francis himself. What it lacked was any strong reliance on the Tertiary history and tradition. What the **Madrid Statement** lacked, with all its clarity regarding charism and its inclusiveness of men and women, was that strong emergence of original Franciscan sources that the French had drawn on so effectively.

The two groups decided to come together to work out a compromise position. Most of the 1970's, after Madrid, were spent in tackling what gave every appearance of being irreconcilable differences. In his Master's thesis, **The Development of the New Third Order Regular Rule**, Paul McMullen, T.O.R. has capably outlined every step of this journey. But in recounting facts, much of the emotional investment is omitted. And that, at this point, is all for the best. Suffice it to say that more than one gathering ended in a spirit of total frustration. There were moments when both sides felt that it might be better to go it alone. But there was always some glimmer of hope. A joint working group was finally established to work out a compromise document. Both Thaddeus Horgan, and Margaret Carney, O.S.F. represented Madrid's best interest in a collaborative mode and played a vital role in the felicitous outcome.

The day finally arrived. March 1982. Ten years after **Genesis I**; eight years after Madrid. Some two hundred Franciscan major superiors of women and men, representing nearly two hundred thousand religious, gathered in Rome to debate, amend, and hopefully approve a new Rule of the Third Order Regular. I remember heading toward the large hall for the opening session with a deep sense of foreboding. We had made gains in understanding but I was by no means certain that these were sufficient. As the representative of my own Order, which takes its roots in the first group of Francis' Penitents, I could not vote in favor of a document that did not express satisfactorily the origins and charism of our Institute. I went to the opening with fear and trepidation. It was the beginning of ten vitally important days.

Ever so slowly my outlook changed. I could actually feel the answer to prayer. The Spirit was in the atmosphere. Attitudes changed; friendships were made; logic held sway. Defending one's turf was not center stage. People were searching for the good of the whole. A sense of openness prevailed. Both viewpoints had their defenders and they did it well. The value of the penitential charism never had better defenders than the Franciscan women generals from the United States, members of the Franciscan Federation. They had done their homework well and were highly qualified to address the issues. But they were not intransigent nor were the champions of the French document. Inclusion of men and women in the Rule's purview was by this time a foregone conclusion.

What began to emerge was the realization that we could have the best of two worlds. The French had drawn on four fundamental Franciscan values in constructing the Rule. These it was felt were important and shared by all Franciscans. Moreover, the French let Francis speak for himself in articulating the values, without extraneous commentary. This was a genuine plus. What Madrid proponents argued with effectiveness was the necessity of highlighting one of the four values, conversion of life, since to treat it on the same plane as the other values would betray the penitential tradition. This direction was overwhelmingly accepted by the hall. The overarching priority of conversion can be seen clearly in a careful reading of the Rule.

On the final working day, the Rule was approved article by article, chapter by chapter. There were few dissenting votes. The consensus of some two hundred participants was practically unanimous. I remember going home that final night, knowing that we had made history. This was an event not to be repeated in our lifetime and probably that of many others. There was lightness to my step and a "Te Deum" in my heart. Never before or since in my lifetime have I so concretely experienced the truth of the psalm, "Unless the Lord build the house, they labor in vain who build it".

The text of the rule went to the Congregation for Religious and Secular Institutes where it received some minor modifications. It was approved by Pope John Paul II before the end of 1982. Of course, Rules are not like books or finished projects. If the proof of the pie is in the eating of it, the proof of a Rule is in the living of it. Only history will tell how effective the work of the last twenty years has been. My own terms as Minister General of our Order ended within months after the Rule's approval. And let it be said for the record that I felt that it was a great note to end on. The 1982 Rule will outlive all of us. It has already outlived one of its prime architects, Thaddeus Horgan, who was one of the first to be called home. I was not present for his funeral. But on the day it occurred I remembered that fall day in Rome when, with leaves falling outside the window, we dreamed of a new spring. □



Thaddeus Horgan S.A. (back) in discussion with Roland Faley T.O.R. during the Rome Assembly which gave the new Rule to Third Order Regular Franciscans of over 430 congregations worldwide, March 1982.