

# **GUIDELINES FOR VISITATION**

From : HANDBOOK FOR SPIRITUAL ASSISTANCE TO THE SECULAR FRANCISCAN ORDER (p. 369 to 377)

## **Part 1. Guidelines for Pastoral and Fraternal Visitations of Local Fraternities**

### **I. Goals of the Visitation (cf. Articles #11 and #26 of the Rule)**

- A. to promote fidelity to the Franciscan Charism
- B. to promote observance of the Rule
- C. to provide support in the life of the fraternity

### **II. Ways to Achieve the Above Goals Through a Visitation**

- A. by helping the fraternity to evaluate itself
- B. by providing inspiration and information
- C. by providing an experience of unity with the Province and the Order

### **III. Operation of Visitations**

A. Since each Fraternity is ultimately responsible for its spiritual and temporal development, each fraternity should, if visitations are not being provided, request a Pastoral and Fraternal visitation (cf. #26 of the Rule). The Friar Provinces should provide a minimum of one Pastoral visitation every three years to each fraternity.

B. The Pastoral Visitation shall be carried out by the Provincial or Regional Spiritual Assistant or his delegate, jointly with a Fraternal Visit whenever possible.

- 1. The Regional Spiritual Assistant should strive to visit every fraternity at least once every three years.
- 2. If the Province or Region is large or geographically spread out, a team of pastoral visitors should be developed and are to be rotated so that a Fraternity will have the benefit of different pastoral visitors.
- 3. If the pastoral visitor is the Spiritual Assistant of a fraternity, he should not conduct the pastoral visitation of that fraternity.

C. The Fraternal Visitation should be carried out by the Regional Minister or his or her delegate, jointly with a Pastoral Visit whenever possible.

- 1. If the Region is large or geographically spread out, teams of fraternal visitors, as delegates of the Minister, are to be developed in the region under the direction of the Regional Minister and Spiritual Assistant through appointed committees.
- 2. The fraternal visitor should not conduct a visitation of his or her own fraternity.
- 3. The fraternal visitation is ordinarily carried out in conjunction with the pastoral visitation.
- 4. Before visitations begin, the fraternal visitor(s) should meet with the pastoral visitor(s) for a training workshop or planning session.

### **IV. Responsibilities of the Fraternal Visitor**

#### **A. Evaluation:**

- 1. Read the minutes of fraternity meetings to see the organizational style of the fraternity.
- 2. Examine the financial accounts of the Fraternity and evaluate the fiscal status of the Fraternity.
- 3. Discuss the style and quality of leadership of the Fraternity. (Are there job descriptions? Are they being followed? Does the council function harmoniously and strive to animate the fraternity?)
- 4. Appraise the style and quality of socializing, the communication and community building of the Fraternity. (Go over the Minister's check-off sheet with the Minister and council.)

5. Examine the structure and effect of the monthly meeting.
6. Evaluate the manner in which the local fraternity promotes new membership and informs local media and parishes about fraternity life and activities.
7. Discuss the fraternity's participation in district or area organizations and Regional activities.

**B. Inspiration:**

1. Listen carefully and be attentive to the needs of individuals and the community.
2. Volunteer helpful hints for leadership training and fiscal responsibility.
3. Give tips and techniques for organization and community building.
4. Encourage the ongoing development of a solid spiritual life in the Fraternity.

**C. Unity**

1. Complement the pastoral ministry of the friar visitor and integrate the two aspects of visitation for the purpose of improving the life and the work of the fraternity.
2. Discuss what is happening in the district and in other areas of the Region. (If a question is presented and you do not know the answer, pass on the unanswered inquiries to the Regional Council.)
3. Review what services the Regional Council offers.
4. Identify and address any lack of communications between the fraternity and the district or area and/or the Regional Council.
5. Obtain updated information for the Regional Council on officers and Fraternity activities.
6. Form a bond of unity and dialogue with the local Fraternity Minister.
7. Encourage potential leaders in the Fraternity to allow themselves to be called forth to positions of Fraternity service.

**D. Goal Setting**

1. Work with the Fraternity Council to set at least one organizational goal and one spiritual goal for the coming year that is appropriate for the local needs.
2. Work out a method of accountability in achieving such goals.

**V. Responsibility of the Pastoral Visitor**

**A. Evaluation:**

1. Examine the register of receptions and professions to ascertain the growth or decline of the fraternity.
2. Examine the style and quality of community prayer of the fraternity.
3. Appraise the style and quality of community life and Franciscan Charism.
4. Examine the style and quality of the ministries of the Fraternity.
5. Pay special attention to the quality and content of formation, both preliminary and ongoing, encouraging the fraternity to seek assistance from the regional team through the Regional Council.
6. Examine the relationship of the local fraternity to the district or area, the Region, and the Local Church.
7. Promote the Fraternity's participation in spiritual growth programs offered by the district or area, the Region, the diocese and other local groups.
8. Appraise the ministry of the Spiritual Assistant: attendance at council meetings, at fraternity meetings, availability to council and members.

**B. Inspiration:**

1. Listen carefully and be attentive to the needs of individuals and the community.

2. Through homily and exhortation, give counsel and advice regarding the Secular Franciscan spirituality, life-style and ministry.
3. When appropriate, provide individual counsel and advice to the members of the Fraternity.
4. Recommend specific areas of growth and offer correction when needed.

**C. Unity:**

1. Complement the fraternal ministry, of the Fraternal Visitor and integrate the two aspects of visitation for the purpose of improving the life and the work of the Fraternity.
2. Review and promote the spiritual growth programs of the Region and advise them of the goods, programs and services available through the Regional Council.
3. Form a bond of unity and dialogue with the local Spiritual Assistant.
4. Provide any resources needed for the spiritual growth of the members.

**D. Goal Setting:**

1. Work with the Fraternity Council to set at least one spiritual growth goal for the coming year.
2. Work out a method of accountability in achieving such goals.

**VI. Reporting**

A. The Visitor(s) should make a written report of the visitation and send it to the Fraternity Minister and Spiritual Assistant, the Regional Council, the Regional Minister and Provincial or Regional Spiritual Assistant. Ordinarily this is a joint report worked out with the Pastoral Visitor.

B. The report should contain an evaluatory summary of-

1. The quality of the spiritual growth and Franciscan awareness through prayer, community life, and ministries.
2. The quality of formation and continuing education.
3. The quality of rapport with higher fraternities and the local church.
4. Integration of the life and work of the fraternity.

**VII. Stipends**

A. Out of courtesy and justice, the Fraternity Council should offer a stipend for both the Fraternal and Pastoral visitor.

B. The stipend should be commensurate with the cost of transportation.

C. The use of these stipends should be clarified in the Regional Statutes. In any case, the visitors should be reimbursed for expenses incurred.

## **Part 2: Guidelines for the Pastoral Visit of the Regional Fraternity**

### **1.0 The goals of the Pastoral Visit are**

- 1.1 to promote fidelity to the Franciscan charism
- 1.2 to promote observance of the SF0 Rule
- 1.3 to provide support for life in fraternity

### **2.0 The objectives for the Pastoral Visit are**

- 2.1 to ascertain the spiritual development of the regional fraternity
- 2.2 to examine the efforts at collaborative formation within the regional fraternity
- 2.3 to become acquainted with the regional fraternity's Franciscan, ecclesial, and apostolic experience
- 2.4 to observe the interaction among fraternities and between the various levels of fraternity
- 2.5 to evaluate the spiritual assistance

### **3.0 The means to achieve these goals and realize these objectives are**

- 3.1 by helping the regional fraternity evaluate itself through the pre-visit questionnaire
- 3.2 by providing support through listening, inspiration and information through presentations
- 3.3 by witnessing through presence to the unity of the Secular Franciscan

Order and to the vital reciprocity of the whole Franciscan Family

- 3.4 by setting a direction for the future through the written evaluation

### **4.0 These means are enfolded as follows:**

#### **4.1 Before the Pastoral Visit:**

- 4.11 Ascertain the time, place, schedule and expectations of participation for the Pastoral Visit
- 4.12 Send out the Pre-Visit Questionnaire

#### **4.2 During the Pastoral Visit:**

- 4.21 Meet with the Regional Executive Council and discuss the pre-visit questionnaire
- 4.22 Meet with the regional spiritual assistants (and, where possible, the gathered local spiritual assistants) to explain and discuss the responsibilities of spiritual assistance on various levels

#### **4.23 Meet with the whole Regional Council to discuss:**

##### **a) Franciscan Awareness:**

- collaborative formation
- cooperation in study and prayer (e.g., workshops and retreats)
- interaction between fraternities
- vital reciprocity with Franciscan Religious (First Order, Poor Clares, Third Order Religious)
- local needs and concerns re: Franciscanism

##### **b) Ecclesial Awareness:**

- representation on diocesan councils/boards
- participation in church events

- promotion of SF0 in church circles
- local needs and concerns vis-à-vis the Church

c) Apostolic Awareness:

- apostolic “specialty” of the regional fraternity
- participation in the “apostolic commissions”
- evangelization efforts within the local Church
- efforts at peace and justice in society
- public relations
- local needs and concern re: apostolate

4.3 After the Pastoral Visit:

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4.31 The pastoral visitor prepares a written report touching on the following:

- a) quality of spiritual development in the regional fraternity
- b) quality of collaborative formation among the local fraternities and coordinated by the regional fraternity
- c) quality of franciscan, ecclesial, and apostolic awareness
- d) quality of interaction among fraternities and between the various levels of fraternity
- e) quality of spiritual assistance

4.32 This report is to be sent to

- a) the Regional Executive Council
- b) the National Executive Council
- c) the Conference of National Spiritual Assistants
- d) the provincial spiritual assistant(s) responsible for the fraternities within the given regional fraternity

Conference of National Spiritual Assistants

Secular Franciscan Order, U.S.A.

June 21, 1993

## FRATERNAL VISIT – PREPARATION CHECKLIST

**Instructions:**

*Please prepare to provide the following items for review by the Fraternal Visitor*

Document of Canonical Establishment

Fraternity Membership Record Book

Secretary's Binder

- Council meeting minutes
- Fraternity meeting minutes

Treasurer's Binder

- Fraternity account ledger

Minister's Binder

Formation Binder

- Initial Formation Program
- Ongoing Formation Program
- Candidates Records

Election Records

### FRATERNITY COUNCIL:

Each office filled by properly elected or appointed professed member

Spiritual assistant appointed for the fraternity

Minutes of Council Meetings

Minutes of Fraternity Meetings

Treasurer's Report

Formation Director's reports on candidates

Election Records

Records of Council decisions regarding membership

### FRATERNITY LIFE:

Consistent time and date for monthly meetings.

Consistent monthly inquirer formation meetings

Program of ongoing formation provided to the fraternity

Annual retreat provided for the fraternity

Regional programs participated in by fraternity representatives

Fraternity apostolate accepted by membership

Copies of current and past regional and national newsletters

**DOCUMENTS:**

Document of Canonical Establishment

Fraternity Membership Record Book

Ritual of the Secular Franciscan Order

Secular Franciscan Order General Constitutions

National Statutes of the Secular Franciscan Order - U.S.A.

Minister's Binder

Secretary's Binder

Treasurer's Binder

Description of Initial Formation Program

Description of Ongoing Formation Program

PRE-VISITATION QUESTIONNAIRE  
FOR THE LOCAL FRATERNITY COUNCIL

*Instructions for Use;*

- ☞ *Two months prior to the time of the fraternity visitation, the minister should duplicate this visitation form for use by the council.*
- ☞ *The completion of the questionnaire is meant to be a collaborative effort accomplished by the entire fraternity council. They may wish to meet together, discuss, and reflect upon the questions and their answers. It is not intended for one person to fill out.*
- ☞ *A copy of the completed questionnaire is to be returned at least three weeks before the date of the visitation to the Fraternal Visitor, who will in turn share its content with the Pastoral Visitor.*
- ☞ *A copy is also to be kept for the records of the local fraternity.*

1. Name of the Fraternity: \_\_\_\_\_

2. Location of the Fraternity: \_\_\_\_\_

3. Members of the Council: (Name, address, Phone number & e-mail)

a. Minister: \_\_\_\_\_

b. Vice Minister: \_\_\_\_\_

c. Formation Minister: \_\_\_\_\_

d. Secretary: \_\_\_\_\_

e. Treasurer: \_\_\_\_\_

f. Councilors & Position \_\_\_\_\_

g. \_\_\_\_\_

h. \_\_\_\_\_

i. \_\_\_\_\_

4. Number of Members in the Fraternity:

a. Active Professed: \_\_\_\_\_ d. Candidates: \_\_\_\_\_

b. Excused Members \_\_\_\_\_ e. Inquirers: \_\_\_\_\_

c. Dispensed Members \_\_\_\_\_ f. Orientation \_\_\_\_\_

5. Inquirer Formation

a. What are the contents of your formation program?

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

b. What structure do you use for formation? (When does the formation program meet? What form do the instructions take? Etc.)

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



6. Ongoing Formation

a. What structure do you use in ongoing formation?

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b. What resources do you use?

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c. Who provides ongoing formation for the fraternity?

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d. How might the quality of ongoing formation be enhanced?

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7. Spirituality (Please address the following areas):

a. Common prayer

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b. Personal spiritual commitment of the members

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c. The fraternity's embodiment of Franciscan gospel values

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

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9. Apostolate: Does your fraternity have an apostolate which it sponsors?

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10. Does your fraternity have contact representatives to the Regional/National Commissions?

If so, who represents these Commissions a.k.a. Ministries for the fraternity?

a. Family

d. Work

b. Ecology

e. Peace and Justice

c. Youth/Young Adult

f. Evangelization

11. What do you feel is the quality of spiritual assistance provided to the fraternity?

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12. Has the fraternity made any efforts toward increasing vocations to the SFO or within the Church as a whole?

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13. Does the fraternity publish a monthly newsletter, and share it with other fraternities? \_\_\_\_\_

14. Please describe the nature of the contact your fraternity has had with the Region:

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15. Are the annual report, the financial support, and other items asked for by the Regional leadership submitted in a timely fashion?

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16. Does your fraternity participate in or send a representative to the annual Directive Council meeting of the Region?

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17. What efforts or accomplishments is your fraternity particularly proud of?

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18. Does your fraternity have any goals it has set for the coming year?

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19. What are your major concerns or problems?

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20. What questions or issues do you feel that the Fraternal and Pastoral Visitors should address?  
What is their priority?

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21. Other Comments:

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### FRATERNITY MINISTER'S CHECK LIST IN PREPARATION FOR VISITATION

*Instructions for use:*

- ☞ *The Minister of the fraternity is to complete this sheet prior to the Fraternal and Pastoral Visitation*
- ☞ *It is to be made available to the Visitors at the time of Visitation.*
- ☞ *It is to be retained by the Minister, and kept in the Minister's Binder. Please keep in mind that it is the responsibility of the Minister and Council to forward all appropriate manuals, records, documents, and binders to new officers.*

#### FRATERNITY COUNCIL:

- \_\_\_\_\_ Each office filled by properly elected or appointed professed member
- \_\_\_\_\_ Spiritual assistant appointed for the fraternity
- \_\_\_\_\_ Minutes of Council Meetings (reviewed and approved by Council)
- \_\_\_\_\_ Treasurer's Report (provided by Treasurer, circulated to Council, made available to the membership, and appropriately audited)
- \_\_\_\_\_ Formation Director's reports on candidates (including attendance and progress)
- \_\_\_\_\_ Election Records (including nomination committee reports, and record of installation of officers)
- \_\_\_\_\_ Appointment of contact persons for all National Commissions
- \_\_\_\_\_ Records of Council decisions regarding membership (lists of excused or dispensed members; delinquent members, pastoral decisions, related correspondence)
- \_\_\_\_\_ Opportunities for training provided to the Formation Director and other formation personnel.

#### FRATERNITY LIFE:

- \_\_\_\_\_ Consistent time and date for monthly meetings. When? \_\_\_\_\_
- \_\_\_\_\_ Minutes of Fraternity Meeting (Approved by fraternity)
- \_\_\_\_\_ Consistent monthly inquirer formation meetings
- \_\_\_\_\_ Program of ongoing formation provided to the fraternity
- \_\_\_\_\_ Annual retreat provided for the fraternity
- \_\_\_\_\_ Retreat provided for candidates
- \_\_\_\_\_ Regional programs participated in by fraternity representatives
- \_\_\_\_\_ Fraternity apostolate accepted by membership
- \_\_\_\_\_ Annual roster of membership (Provided to all members, and kept on record)
- \_\_\_\_\_ Copies of current and past fraternity newsletters kept on file.
- \_\_\_\_\_ Copies of current and past regional and national newsletters (first made available to the members, and then kept on file.

**DOCUMENTS ON FILE:**

- \_\_\_\_\_ Document of Canonical Establishment
- \_\_\_\_\_ Fraternity Membership Record Book
- \_\_\_\_\_ Ritual of the Secular Franciscan Order
- \_\_\_\_\_ Secular Franciscan Order General Constitutions
- \_\_\_\_\_ National Statutes of the Secular Franciscan Order - U.S.A.
- \_\_\_\_\_ Regional Statutes of Divine Mercy Region SFO
- \_\_\_\_\_ Minister's Binder (containing copies of fraternity and council meeting minutes, treasurer's reports, fraternity newsletters, roster of members, regional roster, copies of correspondence to the region, procedures for elections, planned agendas for the fraternity, record of previous visitations)
- \_\_\_\_\_ Secretary's Binder (containing minutes of fraternity and council meetings in a separate binder; another binder should contain secretary's job description, copies of fraternity's correspondence, roster of members, telephone tree line, and catalogue of SFO supplies)
- \_\_\_\_\_ Treasurer's Binder (containing treasurer's reports, copy of job description, treasurer's guidelines -- national, regional, per capita donation records. A bookkeeping ledger of income and expenses should be kept separately)
- \_\_\_\_\_ Historian's Binder (containing history of the fraternity, special events, news clippings, pictures, etc.)
- \_\_\_\_\_ Description of Inquirer Formation Program
- \_\_\_\_\_ Description of Ongoing Formation Program
- \_\_\_\_\_ Supply of Forms (requests for dispensation, requests for visitation and election, application for inquiry, application for candidacy, attendance record cards/envelopes, official transfers, profession documents)
- \_\_\_\_\_ Inventory of what the fraternity owns (equipment, furniture, books, tapes, videos, instruments, etc.)

**OTHER RESOURCES:**

- \_\_\_\_\_ Extra copies of the Rule and Constitutions
- \_\_\_\_\_ Handbook for Spiritual Assistance
- \_\_\_\_\_ Guidelines for Initial Formation
- \_\_\_\_\_ Resources for formation (The Rule of the Secular Franciscan Order with Catechism, Catch Me a Rainbow Too, Fully Mature with the Fullness of Christ, etc.)
- \_\_\_\_\_ Availability of fraternity library
- \_\_\_\_\_ Catalogue of Secular Franciscan Order supplies

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