**PASTORAL and FRATERNAL VISITATION REPORT**

Name of Fraternity ~ location City, state

***Following 7 focuses of statistical information are the responsibility of the Fraternal Visitor:***

# Visitation

Name of Fraternal and/or Pastoral Visitor

Date and place of visitation

# Statistics and Composition

Date Fraternitywas established, and province bonded to.

Membership professed including inactive, candidates, inquirers and orientees.

Comment about growth in past 3 years.

Date council elected.

Name of the Spiritual assistant.

# Preparatory Information

The pre-visitation questionnaire was completed and received by the visitor in advance. Members completed the Reflection Questionnaires and Council members completed the self-evaluations. Roster was presented.

# Records

List records reviewed by the fraternal visitor

Comment about overall (poor, incomplete, good, very good, excellent) Check for the following:

 Roster of Members

 NAFRA data base information

Copies of essential documents including Rule, Constitution, Statutes, Regional Guidelines, and Treasury documents

 Minutes – Fraternity and council minutes

 Attendance records

 Treasury Reports –

 Are reports issued to fraternity – how often?

 Is a budget prepared and presented to membership for approval?

 Do they have a copy of Fraternity Internal Controls and Guidelines?

 Do they use general fund for Fair Share contribution?

 Are records kept of donations? Is Fair Share made annually?

 Formation- are records in good order with well documented lessons and attendance

 Year-End Report

 History- is documentation of past events and history of the fraternity being kept?

 Ledger maintained?

 Publications – do they publish a newsletter or have a web site?

# Participation in local, regional and national activities

Ask about participation in the Annual Regional Gatherings. Any members serving the regional or national fraternities?

**Gathering Observations** Describe format.

Was agenda presented and was business kept to a minimum?

Did all members participate and were encouraged to share?

Describe the on-going formation and who led it.

# Council

What is experience level?

Do they work well together as a team to guide and animate the fraternity? Comment about the guidance and involvement of the Spiritual Assistant.

***Following focus of information is the Responsibility of the Pastoral Visitor:***

**The Four Pillars**

Review the practical applications and make comments and recommendations on how to focus on.

# Spirituality

Do they pray the Liturgy of the Hours together?

Do they explore the lives and example of Franciscan saints?

Comment about the guidance and involvement of the Spiritual Assistant.

# Formation

Do they address orientation, initial and ongoing formation by way of Four Pillars? Do they hold a separate session for initial formation?

 Who leads it?

 Is council active and participating?

 Is care taken to avoid the “group” mentality and focus on the individual?

Do they include those in initial formation in on-going formation? Are all professed involved?

Do the formation director and team set up a schedule of lessons?

Check the time frames

 Regional Formation Commission is recommending extended times, i.e., Orientation Phase – six months; Inquiry Phase – six months to one year; Candidacy Phase – two years. Comment about the guidance and involvement of the Spiritual Assistant.

# Fraternity

Do they support each other as brothers and sisters in Christ and Francis?

Review the answers to the reflection questions.

Do they demonstrate a true family of caring and loving each other in community? Is there participation in the Annual Regional Gathering?

# Apostolate

List apostolates.

Do they benefit the community and help members grow together.

Do they include most members in the activities and work together as a community.

***Following focus of information is the Responsibility of the Pastoral Visitor AND Fraternal Visitor:* Commendations and Recommendations**

Remind minister to give each member of the fraternity a copy of this Report and as a fraternity. Dialogue about the contents and the enclosures and to hold each other accountable for the implementation of the practical applications and the suggestions.

Suggest that they take their pulse at regular intervals and review this Visitation report periodically.

Remember to continue focus on the Four Pillars – Spirituality, Formation, Fraternity and Apostolate. Include any strong suggestions and if a follow up report is requested.

Thank them for time and hospitality.

List the Visitors’ names and contact information.