

## Overview of Fraternal Visitation Process

**Goal:** Create a structure for visitations that treats it as a process spread over several months, and not a single event. Promote fidelity to our Constitutions, which describe the visitation as "*a time of communion, an expression of the service and genuine interest of the secular leaders at the various levels, so that the Fraternity may grow and be faithful to its vocation.*"

### ***Step 1: Preparation for the visitation***

1. Meet and Greet with newly elected council of the local fraternity. This is one year prior to the visitation, and marks the beginning of their **relationship** with the REC, particularly the area Councilor.
2. The fraternal and pastoral visitors should be named 3-4 months in advance of the visitation, if possible.
3. Once assigned, the fraternal and pastoral visitors should communicate to get to know one another, see if there are any outstanding issues for this fraternity (e.g., in the past visitation report) and discuss some of the planning.
4. The visitors should communicate with the local minister and council 2-3 months prior. They should discuss the goals of the visitation and begin planning the visit itself. This is a time to build **trust** and to develop clear **expectations** for the actual visit.
5. The logistics for the visit include the date/times/location, where the visitors will stay, who is making hotel reservations (if needed), dietary restrictions and preferences, times and program of fraternity meeting, requests for private or small group meetings, etc.
6. The self-reflection questionnaire should be circulated to all members of the fraternity, and the process for sharing with the visitors explained. This and the previous step are about **transparency**.
7. The local fraternity should gather one month prior to the visitation for **self-reflection**. They should openly discuss their previous visitation report, how they are living out their Franciscan charism, and the challenges and opportunities they are facing.

### ***Step 2: Meeting of the fraternity with the fraternal and pastoral visitors***

1. The visitors must be attentive to the over-arching goals of the visitation as laid out by the Constitutions: "*fidelity to the charism and the Rule;*" "*reinforcing the bonds of unity*" within the Order and with the First Order; "*integration of the Fraternity...into the [local] Church;*" "*the evangelical and apostolic vitality*" of the local fraternity.
2. The visitors should meet separately with the local Council to verify the financial audit, the records of election, and the canonical establishment of the fraternity. They should discuss with the Council their concerns and any concerns and initiatives of the regional, national, or international fraternities. This discussion should allow the fraternal visitor to evaluate the quality of the leadership of the local fraternity.

3. The visitors should meet with formation director and the inquirers and candidates and learn more about **initial formation**. They should also discuss **ongoing formation**. Both are vital for sustaining and deepening **fidelity** to the Franciscan charism.
4. The visitors should meet with the whole fraternity. This should be a time of **communion** and **sharing** between the visitors and the fraternity, showing both the **concern** of the region for the life and well-being of the local fraternity, and a time of **encouragement** to grow in the Spirit. **Prayer** should be a central component, but also the opportunity for open **discussion** that allows all voices to be heard.
5. The visitors should also meet with the fraternity without the members of the council present. **The local minister** should explain this to their fraternity so that it is clear that this is an opportunity for all members of the fraternity to speak freely to the visitors. The visitors should use the individual questionnaires to guide the discussion.
6. Fraternal correction, if issues arise, should be done in a spirit of **charity** and **fraternity**. The visitors must be mindful of specific local circumstances which have contributed to the situation, and inquire what if anything, the local council has done to address the situation. At the same time, the local fraternity should be open to gaining insight from the visitors.
7. Private meetings with smaller groups or individuals should be arranged if deemed necessary by the local council, members of the local fraternity, or by the visitors. In particular, private meetings with the local pastor or the local spiritual assistant may be called for.

### ***Step 3: Completing the visitation process and forming institutional memory***

1. **The final report should be written jointly by the fraternal and pastoral visitors.** The visitors should draft their report within one month of their visit. If there are question of fact that they are unsure of, or if they feel there are particularly urgent issues, they should share these directly with the local minister and council.
2. At the end of the final report the visitors should summarize all of the recommendations/ suggestions made to the local fraternity, classifying them as major or minor. Major recommendations should include deadlines for the fraternity to act upon them.
3. The final report should be shared with the regional minister. The fraternal visitor should also make a report to the REC at their next regular meeting. If circumstances merit it, the pastoral visitor should be invited to give a report to the REC as well.
4. The final report should be sent to the local minister and council, and they should be asked to share it with their whole fraternity. Reviewing the report is as an opportunity for growth and **continued discernment** by the local fraternity.
5. If there are any significant recommendations in the report, particularly those with deadlines, the fraternal and pastoral visitors should follow up with the local fraternity quarterly and report to the REC at their next regular meeting. In the event of more serious matters, or a failure to follow up, the visitors should seek the assistance of the REC and the regional minister to address them.

