



The National Fraternity of the Secular Franciscan Order - USA
Pastoral and Fraternal Visit to the Regional Fraternity

Checklist in Preparation for a Regional Visitation

Please insure these are available for review during the Visitation:

Minister's Binder / Files: Reports to the Regional Fraternity; Reports to the National Fraternity; Regional Fraternity Mission Statement and Guidelines; REC Meeting Agendas; ongoing list of goals and/or agenda items. All Local Visitation Reports. Budget, Schedules, Calendar, etc.

Secretary's Binder / Files: Regional Fraternity Council Minutes, the Regional Fraternity Executive Council Minutes, important correspondence, Schedules, Calendar, etc.

Treasurer's Binder / Files: Treasurer's Reports; ledger of income and expenses; annual budget; check register; bank statements; updated financial review.

Formation Director Resources: *For up to Now: Foundational Topics for Initial Formation, Guidelines for Initial Formation* (and accompanying CD materials), *Elements of Initial Formation, Regional Formation Director Handbook* and *Handbook for Spiritual Assistants* (all of the aforementioned are National Fraternity publications) as well as the *Formation Resource Manual* (accessed via National Formation Commission webpage); and binder/file of formation related resources and forms for use within the Region.

Regional Spiritual Assistant: same resources as Formation Director; Spiritual Assistant Training Program Outline; NAFRA Guidelines for Spiritual Assistant Training

Regional Fraternity Documents

- ☐ Copies of the OFS Rule, OFS General Constitutions and National Statutes of the OFS-USA
- ☐ Ritual of the Secular Franciscan Order
- ☐ Regional Fraternity Guidelines
- ☐ Formation Resources (*as listed above*) ☐ Handbook for Spiritual Assistants
- ☐ Regional Directory / National Database updated / List of all members of Regional Fraternity
- ☐ Document of Establishment for Regional Fraternity
- ☐ Documents of Canonical Establishment for Local Fraternities, active and inactive
- ☐ File of Regional Forms (i.e., Annual Report for Local Fraternities, Transfer, related forms etc.)
- ☐ Schedule of Pastoral and Fraternal Visitations of Local Fraternities
- ☐ File of Visitation Reports and Annual Reports for Regional and Local Fraternities
- ☐ Visitation Procedure (Pre-Visitation Packet for Local Fraternities)
- ☐ Election Procedures for Local Fraternities
- ☐ History and Archives Documents
- ☐ Newsletters / website / social media – provided links & addresses.

Reminder: The resources listed above are the property of the Regional Fraternity and are passed along to each incoming appointed or elected Regional Fraternity Council member.