

Date: _____

Information Sheet for Fraternal Visitation

Fill out and provide to Fraternal & Pastoral Visitors

Name of fraternity: _____

Date of Canonical Establishment: ____/____/____

Day and time of Fraternity Gathering: _____

What has been done to encourage lapsed members to return? _____

Date of last public vocations event ____/____/____ What program was used? (attach outline)

Date of last Fraternal Visitation ____/____/____

Number of Members in the Fraternity:

a. Active Professed: _____

d. Inquirers: _____

b. Excused (dispensed) Members -----

e. Orientation -----

c. Candidates: _____

Number of Deaths since last Fraternal Visitation ----- Number of Professions since last Pastoral Visitation -----

Date of last election? ____/____/____

How many special interest groups do you have who meet in-between the scheduled local fraternity gathering? _____

Do they attend the local Fraternity Gatherings? -----

What is the purpose of their (special groups) meetings? _____

Name the spiritual programs you've had for the fraternity since your last visitation, other than regular ongoing formation?

Were neighboring fraternities were invited to attend? _____

What prayer and ongoing formation occur at the council meetings? _____

Is there any printed agenda for the regular meeting? If so, please attach a typical copy. -----

When are the envelopes for member contributions/donations distributed and collected? _____

Are the members reminded that their contributions should represent the sacrifices/penances they have made during the past month as well as being a contribution "according to their means"? _____

When is the "Per Capita Contribution" (Fair Share) sent to the Region? _____

DATE: _____

PRE-VISIT 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: _____ Number: _____

2. Location of the Fraternity: _____

3. Elected Members of the Council: **Name & Address** **Phone number & E-mail***

a. Minister: _____

b. Vice Minister: _____

c..Formation Director: _____

d. .Secretary: _____

e .Treasurer: _____

f. Councilors: _____

Spiritual Assistant: _____

4. Appointed positions: **Name & Address** **Phone number & E-mail**

h. JPIC Chairman: _____

i. Youth Chairman: _____

j. Newsletter editor: _____

k. Infirmarian _____

* Everyone should have an e-mail contact within the fraternity.

5 Do you have a complete formation program?

Orientation_____ Inquiry_____ Candidacy_____ Ongoing_____

6. How many parishes are represented in your fraternity? _____

7. Does your fraternity have any involvement with/or sponsor a youth group? _____

8. What form of spiritual assistance is provided to the fraternity? Give examples.

9. What do you believe is your fraternity's success or failure in attracting vocations? _____

10. In what way does the fraternity understand and celebrate its identity as Franciscan penitents while encouraging growth in ongoing conversion in its brothers and sisters? _____

11. What do you most look forward to in your monthly newsletter? _____

12. What is your relationship with the Region? _____

13. Describe your fraternity's participation in district meetings and in cooperating with district projects? _____

14. Are the annual report, the financial support, and other items asked for by the Regional leadership submitted in a timely fashion? If not, explain why not. _____

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

16. What goals has your fraternity set for the coming year?

17. What are your major concerns or problems_____

problems _____

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

[illegible]

Instructions for Use:

- NAME OF FRATERNITY: _____ Number: _____

NAME OF PERSON FILLING OUT THE FORM: _____ Office held: _____

1. When does your council meet? Indicate dates during the past 12 months:

2. How many council members attend council meetings faithfully? _____ Does your spiritual assistant attend council meetings? _____ How often? _____

3. Describe what each of your council members does as part of his/her job. Add pages if needed.

4. In what way does the council seek to give creative leadership to the fraternity? Or, does it just "manage the shop ?" Please explain your answer.

5. What goals have been met or addressed during the last three years?

6. What goals should the council set for itself in the future? _____

7. How do the council members cooperate and collaborate with one another? _____

8. In what way(s) does the minister see that each council member fulfills his or her responsibilities?

9. How does information from Region or National reach you ? _____

10. Are the fraternity's records kept faithfully and adequately ? _____ Made available to the general membership where appropriate? _____
11. When and by whom is the annual budget prepared ? _____

12. When did your last official financial audit take place ? _____
By whom ? _____ Address : _____
13. What means is the council using to develop a greater sense of community in the fraternity ? _____

14. In what ways does the council invite fraternity members to share in the long and short range planning for the fraternity ? _____

15. What prayer forms do you use at your fraternity meetings ? _____

16. Explain the fraternity's functioning in regard to JPIC. _____

17. Explain the fraternity's functioning in regard to Youth _____

18. Explain the fraternity's functioning in regard to evangelization. _____

19. Please list any other areas of concern to you as a council member. _____

FORMATION REPORT

Date _____ **FRATERNITY**

Meeting Day: _____ Time: _____ Quantity of books on hand: _____

List all books and material used for Candidate: _____

Meeting Day: _____ Time: _____ Quantity of books on hand: _____

List all books and material used for Inquirers: _____

Meeting Day: _____ Time: _____ Quantity of books on hand: _____

List all books and material used for Orientation: _____

List Formation Team Members

Position	Name	Phone Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do those in initial formation attend formation sessions regularly? _____

Do those in initial formation attend fraternity meetings regularly? _____

If the answer above is anything but an unqualified "Yes", please explain. _____

Please have available for the Visitors the Formation Record (of attendance and topics covered) that is up-to-date.

Do formators and those in initial formation attend Regional functions ? _____

Are Candidates taught use of the Liturgy of the Hours ? _____

How often do those in initial formation have Days of Recollections or Retreats ? _____

Does each Candidate have a sponsor ? _____

Has each council member spent one-on-one time with each Candidate ? _____

Does the Council critique and participate in the Formation program ? _____ Describe. _____

Please submit an example of an initial formation presentation.

Please submit an example of an ongoing formation presentation.

ADDITIONAL COMMENTS :

FRATERNITY COUNCIL'S CHECK LIST IN PREPARATION FOR REGIONAL VISIT

Instructions for use :

The fraternity council is to complete this form prior to the Fraternal and Pastoral Visit. This form is to be made available to the Visitors at the time of the Visit. This form is to be retained by the Minister, and kept in the Minister's Binder.

NOTE: All appropriate manuals, records, documents, and binders must be forwarded to new officers by the outgoing Council and Minister and are to be retained in perpetuity.

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FRATERNITY COUNCIL: _____

Each office to be filled by properly elected or appointed professed member _____

Name of Spiritual Assistant appointed for the fraternity _____

Minutes of Council Meetings (reviewed and approved by the Council) _____

Treasurer's Report (provided by Treasurer, circulated to Council, made available to the membership, and appropriately audited: _____

Formation Director's Report concerning Inquirers and Candidates and records maintained **for each individual** - not to be a compilation or overview - and to include attendance and progress _____

Election Records - including nomination committee reports and record of installation of officers: _____

Records of Council decisions regarding membership (lists of excused [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 Council Meeting (**Approved by Council**) _____

Consistent monthly initial formation meetings ("monthly" is the minimum required) _____

Program of ongoing formation provided to the fraternity _____

What format is used? Explain. _____

What does this cover? Explain. _____

Annual retreat provided for the fraternity? _____ When last provided: _____

Retreat provided for Candidates? _____ When last provided: _____

Regional programs participated in by fraternity representatives? ____ List those in last 3 years: _____

How many members participated in the above Regional programs? Put numbers beside the name of the Program in the above list.

How many in initial formation participated? _____

Copy of Annual Roster of Membership (provided to all members, and kept on file): _____

Copies of current and past fraternity newsletters kept on file: _____

Copies of current and past regional newsletters (made available to the members, and kept on file) _____

REQUIRED DOCUMENTS ON FILE : _____

- _____ Document of Canonical Establishment
- _____ Fraternity Membership Record Book
- _____ Ritual of the Secular Franciscan Order (enough for each member)
- _____ Rule of the Secular Franciscan Order (each member should have his/her own and the fraternity should have some extra copies for visitors to the fraternity)
- _____ Secular Franciscan Order General Constitutions
- _____ National Statutes of the Secular Franciscan Order - U.S.A.
- _____ Regional Norms of St. Francis Region of the Secular Franciscan Order
- _____ Minister's Binder (containing copies of Secular Franciscan Order Rule, General Constitutions, National Statutes (U.S.A.), Regional Norms of St. Francis Region, Guidelines for Initial Formation, Forms, including all Job Descriptions, roster of members, regional roster, procedures for elections)
- _____ Secretary's Binder (containing minutes of the general meeting, minutes of council meetings in a separate binder; another binder containing copies of the fraternity's correspondence, record of _____ previous Visits, roster of members, telephone tree line, and catalog of OFS supplies.)
- _____ Treasurer's Binder (containing treasurer's reports, treasurer's guidelines - national, regional, per capita donation records; a bookkeeping ledger of income and expenses ; a separate record of the contributions of each individual member)
- _____ Historian's Binder (containing the fraternity's history, special events, news clippings, photos, etc.)

OTHER DOCUMENTS ON FILE : _____

- _____ Description of Orientation and Initial Formation Program.
- _____ Description of Ongoing Formation Program.
- _____ Forms* (requests to be excused ; requests for change of date of election or visit ; application for inquiry ; application for candidacy ; official transfer forms)
- _____ Inventory of the fraternity's property (equipment, furniture, books, tapes, videos, instruments, etc.)

REQUIRED RESOURCES :

- Extra copies of the Rule, Constitutions, National Statutes, and Regional Governance Norms.
- _____ Handbook for Spiritual Assistance (latest edition)
- Guidelines for Initial Formation
- Handbook of Servant-Leadership
- _____ Council Resource Manual

OTHER RESOURCES:

- _____ Resources for formation (The Rule of the Secular Franciscan Order with Catechism; General Constitutions; National Statutes; Ritual; The Franciscan Journey; Pick More Daisies; the F.U.N. Manual; Catch Me a Rainbow Too; Fully Mature with the Fullness of Christ, etc.
- _____ Availability of fraternity library
- _____ Catalog of supplies for the Secular Franciscan Order

* Most forms needed by fraternities are on the St. Francis Region website: www.stfrancisregion.org

