



ST. THOMAS MORE
PASTORAL AND FRATERNAL VISITATIONS



CHECK OFF LIST IN PREPARATION FOR VISITATION

Please ensure that your Fraternity has the following on hand at the time of the Visitation:

Minister's Binder / Files:

- ___ Annual reports to the Regional Fraternity
- ___ Fraternity mission statement and Guidelines
- ___ Ongoing list of goals and/or agenda items
- ___ Copies of Fraternity Council minutes
- ___ Copies of Fraternity Executive Council minutes
- ___ Treasurer's reports, budget, schedules, calendar, etc.
- ___ Past visitation reports
- ___ Correspondence
- ___ Directory of fraternity membership

Secretary's Binder / Files:

- ___ Roster of members
- ___ Attendance records
- ___ Fraternity Council Minutes
- ___ Fraternity Executive Council Minutes
- ___ Important correspondence, schedules, calendar, etc.
- ___ Official Fraternity Register
- ___ Copies of Election Results
- ___ Binder/file of Fraternity forms
 - ___ Transfer forms
 - ___ Formation related forms
 - ___ Election procedures and forms

Treasurer's Binder / Files:

- ___ Current annual budget
- ___ Treasurer's reports
- ___ Current ledger of income and expenses
- ___ Current ledger of contributions received
- ___ Bank account registers
- ___ Bank reconciliations and statements
- ___ Year-end reports

Formation Director Resources:

- ___ For up to Now: Foundational Topics for Initial Formation, Guidelines for Initial Formation. (*F.U.N. Manual* with CD materials)
- ___ Elements of Initial Formation
- ___ Formation Director handbook
- ___ Handbook for Spiritual Assistants
(All of the aforementioned are National Fraternity publications)
- ___ Regional Formation Guidelines
- ___ Formation Resource Manual (accessed via National Formation Commission webpage)
- ___ Binder/file of formation related resources and forms for use within the fraternity
- ___ Attendance records for those in Initial Formation
- ___ Initial Formation plan or schedule
- ___ Records of time frames for Initial Formation:
 - ___ Orientation – 3 months minimum
 - ___ Rite of Welcoming date
 - ___ Inquiry – 6 months minimum
 - ___ Rite of Admission date
 - ___ Candidacy – 18 months minimum – 36 months maximum
- ___ Ongoing Formation plan or schedule

Spiritual Assistant:

- ___ Appointment letter from the Provincial Spiritual Assistant or appointee
- ___ Same resources as Formation Director
- ___ Spiritual Program Outline
- ___ NAFRA Guidelines for Spiritual Assistant
- ___ Certificate of completion of the *Franciscan Family Connections* course
- ___ Handbook for Spiritual Assistants

Fraternity Resources:

- ___ Copies of the OFS Rule, General Constitutions and National Statutes of the OFS-USA
- ___ Ritual of the Secular Franciscan Order
- ___ Fraternity Guidelines
- ___ Formation Resources *as listed above*
- ___ Handbook for Spiritual Assistants
- ___ Fraternity Directory / List of all members of the Fraternity
- ___ Document of Canonical Establishment for the Fraternity
- ___ Previous Pastoral and Fraternal visitations reports
- ___ History
- ___ Archives
- ___ Newsletters / Website
- ___ Fraternity Library

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