The National Fraternity of the Secular Franciscan Order - USA

**Pastoral and Fraternal Visit to the Regional Fraternity**

**CHECK OFF SHEET IN PREPARATION FOR REGIONAL VISITATION**

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

# Minister’s Binder / Files: Reports to the Regional Fraternity; Reports to the National Fraternity; Regional Fraternity Mission Statement and Guidelines; ongoing list of goals and/or agenda items. Copies of Regional Fraternity Council Minutes, Regional Fraternity Executive Council Minutes, Treasurer’s 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.

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 Resources

\_\_\_ 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

\_\_\_ Binder/file of Regional Forms (i.e. Annual Report for Local Fraternities, Transfer, Formation 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

\_\_\_ Archives

\_\_\_ Newsletters / Website

*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.

*This form is approved by the National Executive Council OFS-USA – March 2018*

Reviewed by NEC 12/10/16