

Federation of St. Scholastica

Guidelines for Canonical Visitation

Introduction

Through the visitation of its member monasteries, the Federation of St. Scholastica provides a structure by which a community evaluates the authenticity of its lived experience of the Rule of Benedict and the federation's constitution, *Call to Life* (CN 8). The visitation of member monasteries is a means of offering support, advice, correction, exchange of ideas and direction. The entire process is meant to foster hope and the development of a clear community-supported direction for the future.

Visitation involves community preparation, the on-site visit and the community's commitment to the recommendations of the visitators (SN 48.a, SN 50). These guidelines and suggested procedures detail the process to assist a member monastery in the assessment of its fidelity to monastic life in a given place, time and culture. Community involvement in the entire process prepares the community to accept and support ongoing plans and recommendations for the monastery's future. The procedures are to be used in conjunction with *Call to Life* norms, CN 8, SNs 47-52, SN 92.f, SN 124, SNs 134-5. Each community adapts the suggested procedures to meet its own circumstances to ensure a successful visitation.

Visitation Preparation

Every visitation involves community participation in a self-study. A well developed self-study creates a positive experience allowing the previous work of the community to be integrated with new understandings of what is needed for the community's evolving journey.

Each visitator receives the printed materials relating to the self-study one month prior to the visit. These materials are used in preparation for the on-site visit.

On-Site Visit

During the on-site visit community members and visitators meet in various ways. Whenever they meet, community members are expected to speak freely and visitators are to listen openly. Visitators are also expected to review council and chapter minutes, finance records and future planning documentation.

When the report on the visitation is finished, the visitators sign two copies of the final report and recommendations: one for the community's file and the other for the federation's file.

Post Visitation

After the on-site visit the community begins the implementation of the recommendations given in the report. (SN 50) The president and federation council review the visitation report at its next regular meeting.

Responsibilities of the Prioress

1. Assure the involvement of the entire community in all phases of the visitation.
2. Appoint a coordinating committee for the self-study and the on-site visit.
3. After consultation with the council and/or the coordinating committee, set a date for the on-site visit, choose the visitators and determine the chairperson. The prioress then notifies the federation president of both (SN 48.b and c.).
4. The prioress sends a progress report to the federation president three years after the on-site visit (SN 50).

Responsibilities of the Coordinating Committee

The following work can be done by the coordinating committee or delegated to other committees or individuals.

1. Gather the following for possible community review and for the visitators:
 - a. Last two visitation reports
 - b. Interim reports
 - c. Direction statements
 - d. Other corporate statements
 - e. Monastery norms
2. Provide an updated community history and membership profile
 - a. Brief community chronology
 - b. Significant community events during the past six to ten years
 - c. Membership profile that includes: work assignments, residences, education, age or any additional relevant information about the membership.
3. Provide for financial data including:
 - a. Current operating budget (SN 135)
 - b. Most recent financial review or audit (SN 134)
 - c. Year-end report
 - d. Information on any capital budgets, deferred maintenance and any areas of financial concern
 - e. Financial projections for five to ten years (ex. TRENDS, NRRO, feasibility studies, etc.)
4. Engage the community in a well-developed self-study that includes a review of the recommendations of the previous two visitations, direction statements, other corporate statements and monastery norms.
5. As the community reviews all of the above information, the following or similar questions, could be useful for community discussion:
 - a. How are we as a community responding to the internal and external influences on our life?
 - b. Do any of these areas need our attention or revision?
 - c. How can we best work on them?
 - d. Are there other areas that we might desire to work on in the next three to six years to help us continue to be a hope-filled monastic presence where we live and work?

Responsibilities of the President

1. At least a year and a half in advance, the president sends a letter to the prioress reminding her of the monastery's approaching time for visitation.
2. Ordinarily the president is one of the visitors. (SN 48b)
3. Once she has been informed of the visitors, the president authorizes in writing the members of the visitation team. (SN 5.c, SN 26.d, SN 48.d).

Responsibilities of the Visitors

1. The chair of the visitation team, in consultation with the coordinating committee, sets the schedule and arranges meetings with the following:
 - a. Coordinating committee
 - b. Prioress and the council (separately) at the beginning and then at the end of the visitation.
 - c. Community committees and/or boards
 - d. Women in any stage of formation
 - e. Groupings of sisters, including any sisters in a health care unit, etc.
 - f. Individual sisters who may request time with a visitor
2. Prior to their arrival at the monastery, the visitors study the materials sent by the coordinating committee.
3. Listen carefully to each group and person.
4. Review financial information and minutes from council and chapter meetings that are made available on site during the visitation.
5. Prepare a written report and recommendations. The report may include observations and/or commendations. It should take into account any recommendations brought forward by community members during the time of visitation.
6. The visitors may prepare additional points to share with the prioress and/or the council. Generally, the visitors do not put the concern of an individual into a recommendation. In the same manner, comments made about an individual member of the community may be directed to her by the visitors if they are frequently repeated during the visitation.
7. Share the written report with the monastic council and then with the prioress before the closing meeting with the community.
8. Give their report to the community orally and in printed form.

Responsibility of community members

1. Participate actively in the self-study process.
2. Cooperate with the visitors and community during the on-site visitation.
3. Work with the prioress and community in implementing the recommendations from the visitors (SN 92.f).

Progress Report

Three years after the on-site visit a progress report is prepared and sent to the federation president.

Extraordinary Visitation

An extraordinary visitation of a monastery may be initiated in accordance with SN 52. The possible need for such a visitation is addressed in SN 104, SN 5.c, SN 26.d, SN 38.k, SN 39.f and SN 124.

Ordinarily, the president will be the chair of the extraordinary visitation unless it is being held in her own community.

It is recommended that at least three visitators participate in an extraordinary visitation.

Visitation Expenses

Each monastery pays the transportation costs for the visitators and provides a stipend for each (SN 51).

APPENDIX A
Relevant Norms from Canon Law and Call to Life

Canon 628

- § 1 The superiors whom the proper law of the institute designates for this function are to visit the houses and members entrusted to them at stated times according to the norms of this same proper law.
- § 3 Members are to act with trust toward a visitor, to whose legitimate questioning they are bound to respond according to the truth in charity. Moreover, it is not permitted for anyone in any way to divert members from this obligation or otherwise to impede the scope of the visitation.

CN 8 Visitation of member monasteries is the responsibility of the federation. Its purpose is to provide a structure by which a community may evaluate the authenticity of its lived interpretation of the Rule within the broader context of the Benedictine tradition. The frequency of and procedure for visitations are outlined in the Specific Norms.

SN 47 Ordinary visitation of each monastery of the federation will occur every six years (SN 5.c, SN 26.d).

SN 48 In preparation for an ordinary visitation:

- a. Each monastery conducts a self-study before the visitation (SN 134).
- b. Each visitation team shall be composed of at least two members. Ordinarily one visitor shall be the federation president. In her absence a member of the federation council shall be chosen. The second visitor shall be selected from women's Benedictine communities. According to the monastery's needs, additional visitors selected from women's Benedictine communities may be requested. Any visitor may serve as chairperson of the visitation team.
- c. The prioress notifies the president when the visitation team is formed and its chairperson selected.
- d. The president issues a written confirmation of the visitation team and authorizes it to conduct the visitation of the monastery on behalf of the federation (SN 26.d).
- e. All other procedures, not provided for in the visitation guidelines, are determined at the monastery level in consultation with the president and/or the visitation team.

SN 134 Each monastery regularly evaluates its use of funds, property, and corporate holdings. Prior to the time of visitation a monastery will have a financial audit or financial statements review. The report will be available to the visitors (SN 48.a).

SN 135 Each monastery shall establish an annual operating budget for the monastery itself. According to the monastery norms, either the monastic chapter or the monastic council shall approve this budget and receive quarterly reports.

SN 49 At the close of the visitation, the visitors will give an oral report to the community. This report should be prepared in written form and made available to all

chapter members. The chairperson of the visitation team will forward the complete official copy of the report to the president as soon as possible. Another copy will be filed in the official permanent records of the monastery.

SN 50 The monastery is responsible to use the visitors' written report as a means to improve its way of life and to prepare a progress report to the president three years after the visitation.

SN 51 Each monastery bears the cost of all visitation expenses. If, however, the monastery cannot meet these expenses, the prioress may request financial assistance from the federation.

SN 52 An extraordinary visitation of a monastery may be initiated by a prioress or by the president with the consenting vote of the federation council (SN 38.k). A member of the monastic council may request an extraordinary visitation. The federation president, in consultation with the federation council and if possible, the monastery to be visited, sets the time of the visitation and appoints the visitors. The president will inform the prioress and the monastic council of the reasons for and the dates of the visitation, and the names of the visitors (SN 5. c, SN 39. f, SN 124)

SN 124 If the prioress is unable to fulfill the responsibilities of her office and a pastoral visit of the president requested by the monastic council has not resolved the situation (SN 104), then the president, with the consenting vote of the federation council, will authorize and conduct an extraordinary visitation before taking any action (SN 5.c, SN 26.d, SN 38.k, SN 52).

APPENDIX B

Planning Calendar

1. Visitors are chosen at least fourteen (14) to sixteen (16) months prior to the desired date of the on-site visit.
2. Periodic conversations should be scheduled between the chairperson of the monastery's coordinating committee and the chairperson of the visitors regarding the on-site schedule, etc.
3. The community's self-study materials are sent to each visitor at least one month in advance of the on-site visitation.
4. Three (3) years after the visitation the prioress sends the interim report to the president of the federation.

APPENDIX C

Progress Report Guidelines

A progress report is prepared three years after the most recent visitation and sent to the president of the federation. The report may be done by a committee or an individual community member, using the form provided by the president. Its preparation and final form ought to reflect the consultation, suggestions and affirmation of the community.

The report ought to reflect, in summary, the manner in which the community has responded and acted on each recommendation. It ought to indicate any positive improvement. If no action has been taken on any recommendation, the report ought to explain why and indicate what is intended in the next three years. Attachments may be included that support the content of the report.

Accepted for use: _____