

**GUIDE FOR VISITATIONS  
IN THE  
AMERICAN-CASSINESE CONGREGATION  
OF BENEDICTINE MONASTERIES**

OFFICE OF THE PRESIDENT  
1994

The  
***GUIDE FOR VISITATIONS***  
*in the*  
***AMERICAN-CASSINESE CONGREGATION***  
*of Benedictine Monasteries*

was approved by the  
forty-fourth general chapter  
of the American-Cassinese Congregation

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## PREFACE

Benedictine monasteries are autonomous. Although most of them belong to a monastic congregation, such a body is only a loosely-organized association for mutual assistance. It does not often impinge upon the daily life of its member monasteries.

The principal exception to this is the visitation, when abbots and monks from other houses come to examine the life of a particular monastery. It is a means of helping a community to see where it is going, what problems it finds along the way, and what can be done to solve them. Visitations are the principal means by which the congregation assists individual monasteries.

Shortly after Vatican Council II, the American-Cassinese Congregation took steps to improve its visitation practice. These efforts resulted in the *Guidelines for Visitation*, published in 1974, that have served us well as the norm for our visitations for nearly two decades.

In 1990 the Congregation published *The Constitutions and the Directory*, which now constitute its proper law, including provisions for visitations. Although the new law made few changes, a revision of the visitation guidelines was needed to bring them into full conformity with the proper law and to recognize changes of emphasis that have now become desirable.

The forty-third general chapter in 1989 mandated the appointment of a committee to draft a revised version. The committee consisted of Abbot Owen Purcell (B) and Fathers Daniel Ward (J) and Clement Zeleznik (An), with Father Claude Peifer (Bed) serving as chairman. The draft that they prepared was discussed, revised, and approved by the forty-fourth general chapter at St. Bernard Abbey in 1992.

The result of these efforts is this new *Guide for Visitations in the American-Cassinese Congregation of Benedictine Monasteries*. May it help us to use this ancient instrument of monastic renewal effectively in order to bring new vitality to our monasteries today.

March 21, 1994

+ Melvin Valvano, O.S.B.  
President

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## INTRODUCTION

- V 1. Visitation is defined in *The Constitutions and the Directory of the American-Cassinese Congregation of Benedictine Monasteries* as "the personal evaluation of a monastery by authorized representatives of the Congregation in order to assess monastic life and observance, to stimulate growth, to aid in the correction of deficiencies, and to assist the local community in the solution of any problems" (C 126). Although there are earlier historical antecedents, this developed form of the visitation procedure, which is closely linked with the institution of the general chapter and the development of monastic congregations, evolved in the Middle Ages as one of the principal instruments of monastic reform and has continued in use down to the present.
- V 2. When the American-Cassinese Congregation was erected in 1855, the regular visitation of monasteries was already an established practice in all monastic congregations. Provision for it was therefore incorporated into the constitutions that were drawn up under the direction of Boniface Wimmer. The system of triennial visitation that was adopted was based largely upon the practice of the old Bavarian Congregation, which had existed from 1684 until the suppressions of 1802. This visitation procedure was followed, with few alterations, for more than a century, until after the Second Vatican Council.
- V 3. In response to the council's mandate to renew the religious life, the capitulars of the thirty-seventh general chapter in 1971 authorized a committee to draw up new experimental guidelines for visitations. These provisions were used in the visitations conducted in 1972-73 and, in the light of this experience, were reviewed by a special general chapter in 1973. This assembly entrusted the revision of the visitation system to a new committee that was mandated to incorporate the chapter's decisions into the *Guidelines for Visitation* that were approved by the thirty-eighth general chapter in 1974 and published that same year. These *Guidelines* constituted the norm for visitations for the next fifteen years.
- V 4. The complete revision of the Congregation's proper law was promulgated in 1989 and published in 1990 as *The Constitutions and the Directory of the American-Cassinese Congregation of Benedictine Monasteries*. The norms for visitations are contained in Part III, Chapter II of this document (C 126-D 128.11). The forty-third general chapter in 1989 mandated the revision of the *Guidelines for Visitation* in order to update them and bring them into full conformity with the new constitutions and directory. In 1990 a committee was appointed to prepare such a revision for approval by the general chapter of 1992.
- V 5. The legislation of *The Constitutions and the Directory* regarding visitations does not differ substantially from the provisions of the 1974 *Guidelines*. The proper law of the Congregation is now contained in *The Constitutions and the Directory*; the *Guide for Visitations* is a handbook meant to comment upon and assist in implementing the proper law. The *Guide for Visitations* reproduces, for the sake of convenience, all of the paragraphs of the proper law that concern visitations (though in a slightly different order); the remainder of the text constitutes a kind of commentary upon this law and some practical procedures to help in implementing it.

- V 6. What is new in the *Guide for Visitations* is not primarily changes of legislation, but rather a difference in emphasis. In the twentieth century profound changes have taken place in the world, in the Church, and in our monasteries. Consequently our communities are increasingly called upon to become aware of the changed situation in which they find themselves and to respond to it in a creative way. As a result, the service rendered to a community by the Congregation through visitations receives a somewhat different emphasis than in the past: rather than merely offering judgments upon matters of observance, visitators are now called upon to help the members of a community understand their own needs and to help them undertake the kind of planning that is required to meet these needs.
- V 7. Accordingly, the *Guide for Visitations* is intended to assist communities and visitators in the same ways as in the past; neither the purpose nor the methods employed have been fundamentally altered. What is new in this revision is solely a matter of emphasis, especially in the following two areas:
- V 8. 1. There is a stronger emphasis upon maintaining continuity from one visitation to the next. Every community that wishes to grow in its communal vocation is thereby engaged in a process of gradual development. Visitations should assist this process by providing a periodic review of its progress. A visitation may be seen as a snapshot of a community at a particular stage of its development. A visitation should evaluate a community in the light of the previous stages through which it has passed, and the community may profit by the findings of the visitation to help them refocus or reorient their own process of growth. Therefore, both the community and the visitators should see each visitation not as an isolated event, but as a marking point in a continuous process.
2. The other new emphasis is related to this point. A community's own growth process may lead it to reexamine now one and now another aspect of its life. Rather than making every visitation a generic examination of its entire life, a community may find it more profitable to limit a particular visitation to one or more specific areas with which it is particularly concerned at a given moment in its history. However, when such a narrowing of the visitation's focus is undertaken, individual members of the community still remain free to raise other issues during the visitation, and visitators are likewise free to address other issues in their reports.

## **PART I**

### **THE HISTORICAL CONTEXT AND PURPOSE OF VISITATIONS**

- C 126.** Visitation is the personal evaluation of a monastery by authorized representatives of the Congregation in order to assess monastic life and observance, to stimulate growth, to aid in the correction of deficiencies, and to assist the local community in the solution of any problems.
- C 128.** It is the responsibility of the President of the Congregation to provide for a visitation, either ordinary or special, according to the procedures established in the proper law of the Congregation.

#### ***Section A: The Historical Background of Visitation Practice***

- V 9.** Although visitation in the systematic form in which it is found in monastic congregations today is the product of a gradual historical evolution, the roots of the practice spring from fundamental Christian realities that appear already in the New Testament and then in early Christian and monastic tradition.

#### **1. The Apostolic Practice of Fraternal Correction**

- V 10.** Already in the first Christian generation, the disciples of Jesus acknowledged their need to be corrected and admonished by their brothers and sisters as a means of helping them to conform their lives to the example of the Lord. St. Paul summed up this conviction in his advice to the community of Thessalonica to "admonish the idle, cheer the faint-hearted, support the weak, be patient with air (1 Thes 5,14). To the Galatians he wrote, "Even if a person is caught in some transgression, you who are spiritual should correct that one in a gentle spirit, looking to yourself, so that you also may not be tempted" (Gal 6,1).
- V 11.** Paul himself did not hesitate to intervene with appropriate admonition when problems arose in the communities that he founded and over which he presided; the difficulties that arose in Corinth prompted him even to invoke excommunication and stern rebuke in order to bring healing to the erring (1 Cor 5,5.11). At the same time, he could be generous in offering praise and positive support to those who were making sincere efforts to live the Christian life in a serious way (see 1 Thes 1,2-10). Paul and his disciples often recommended this practice of correction in a spirit of concern for the genuine welfare of others (see 2 Thes 3,13-15; Col 3,16; 2 Tm 2,25). In the literature of the subapostolic period we find a similar practice of helping Christian communities to recognize and live up to their obligations (see 1 Clement and the letters of Ignatius of Antioch).

- V 12. The Matthaean church not only taught a similar doctrine, but founded it directly upon a saying of Jesus that is transmitted only by the first gospel, viz., "If your brother sins against you, go and tell him his fault between you and him alone. If he listens to you, you have won over your brother. If he does not listen, take one or two others along with you, so that 'every fact may be established on the testimony of two or three witnesses.' If he refuses to listen to them, tell the church. If he refuses to listen even to the church, then treat him as you would a Gentile or a tax collector" (Mt 18,15-17).
- V 13. This passage, which is the fundamental New Testament text on correction within a Christian community, must be understood in the light of the Jewish background that it presupposes. In the Old Testament God gradually formed his people through human agents, the prophets, to whom he addressed his word for the upbuilding of all. This divine pedagogy continues in the Christian community through the service of teaching, government, and admonition of the "apostles, prophets, and teachers."

### 2. Pastoral Visitation in the Early Church

- V 14. The practice of a pastor's visiting the flock under his care, either personally or through a delegate, goes back to the apostolic period. In the letters attributed to St. Paul that have come to be known as the "pastoral epistles," the apostle is depicted as sending Timothy and Titus, his collaborators, to visit the communities that he had established in Ephesus and in Crete, respectively. Their role was to preach the gospel and to teach sound doctrine, to correct error, to reprove improper conduct, and generally to build up the community. These letters became the model for the practice of pastoral visitation by bishops during the patristic period.
- V 15. St. Athanasius, who was often exiled from Alexandria, took advantage of this misfortune to visit Christian communities in upper Egypt, including monastic communities. St. Gregory the Wonder-Worker was likewise eulogized by Gregory of Nyssa for his zeal in visiting his flock and guarding it from error. In the western Church we find St. Augustine lauded by his biographer Possidius for a similar concern. Likewise, the *Life of Martin* by Sulpitius Severus depicts the monk-bishop Martin of Tours as constantly engaged in visiting the churches of the diocese that constituted his flock.

### 3. Early Monastic Visitation Practice

- V 16. When monastic life began its phenomenal growth in the fourth century, the monks, like all other Christians, fell under the jurisdiction of the local bishop, who visited them as members of his flock and therefore as recipients of his pastoral concern. From the beginning, however, the charismatic nature of the monastic life produced a certain tension between the monks and the Church's hierarchical authorities, regardless of the esteem in which they may have held one another. Hence monks began to develop their own structures for self-government and for supervision.
- V 17. We find this already in the case of the Pachomian monasteries, which multiplied rapidly in upper Egypt and quickly spread to several different dioceses. These large communities were seen by their founder as forming a single "*koinonia*," and he maintained supervision over them all by periodic visits to the various houses. This constituted the first known example in monastic history of an organized visitation

system. Pachomius and his successors strove to maintain regular monastic observance and a delicate sense of fraternal charity among all the monks and nuns of the *koinonia* by visiting each community once a year. There was also a regular reunion of the *koinonia*, which may be seen as a forerunner of the later institution of the general chapter.

#### 4. *The Rule of St. Benedict*

- V 18. The *Rule of St. Benedict*, like most early monastic rules, legislates for a single monastery without juridical ties to any other house. Likewise, it ordinarily does not envisage recourse to any authority outside the community itself. In the case of the election of an unworthy abbot, however, it prescribes that the local bishop or the abbots and faithful of the vicinity should intervene to undo the wrong (64,3-6). In the west at this time, as is clear from the slightly later correspondence of St. Gregory the Great, the bishop exercised jurisdiction over the monasteries of his diocese, and it was his responsibility to watch over their religious observance.
- V 19. The *Rule of St. Benedict*, however, rooted as it is in authentic Christian tradition, is not insensitive to the value of fraternal correction from other sources, as is clear from its statement about the pilgrim monk: "He may, indeed, with all humility and love, make some reasonable criticisms or observations, which the abbot should prudently consider; it is possible that the Lord guided him to the monastery for this very purpose" (61,4). It is but a step from this principle to the later institutionalization of procedures that would regularly provide such advice from visiting monks designated for this purpose.

#### 5. *The System of Regular Visitation*

- V 20. In the western church after St. Benedict monasteries continued their isolated existence under the jurisdiction of the local ordinary, without being formally joined into any larger unity. Gradually the *Rule of St. Benedict* was spontaneously adopted by more and more monasteries, replacing other monastic rules that had previously been in use. The effort to unify monastic observance developed in the wake of the Carolingian renaissance, which applied its organizing genius to the religious as well as to the political and cultural life of the empire.
- V 21. The reforming abbot Benedict of Aniane, who had previously adopted the Benedictine rule in his own monastery, was authorized by the emperor Louis the Pious to reform all the monasteries of the realm under this rule and under a single observance. The reform was instituted at two synods of abbots, who were summoned to Aachen in 816 and again in 817 to be instructed in the *Rule of St. Benedict* and in the customary that was to be universally observed. A system of visitation of monasteries was also introduced to insure the correct observance of the decrees of the synods.
- V 22. In fact, the reform of Aachen did not long endure, for the Carolingian empire was soon torn apart by civil wars among Louis's sons and then by the incursions of the Northmen. Monasteries were fortunate even to survive during the rest of the ninth century. But the concept of organizing monasteries into a larger grouping, with uniformity of observance as an ideal and a system of visitation to assist in its realization, was not forgotten. A century after Benedict of Aniane, it was revived with the remarkable growth of Cluny, after its

foundation in 910, into a union of monasteries that eventually became a monastic empire enjoying freedom from episcopal intervention.

- V 23. In the eleventh and twelfth centuries a number of similar "orders" of monasteries were to flourish. There were numerous differences from one to another, but they generally strove to maintain the same observance in all their houses. A twofold means of achieving this purpose was commonly employed: a system of visitations and the institution of the general chapter. Both were a revival of the methods of Benedict of Aniane.

#### 6. *The Development of Visitation Procedures.*

- V 24. A major step in visitation procedure was taken by the Cistercians in the early twelfth century. Anxious to maintain uniformity of observance and bonds of fraternal charity among their rapidly multiplying monasteries, they adopted the *Charter of Charity* in 1114. It prescribed an annual general chapter and the annual visitation of every monastery by the abbot of its founding abbey. At least during the golden age of the order, this system proved enormously successful in maintaining the ideals of the founders, and it had an important influence upon later canonical legislation.
- V 25. In 1215 the Fourth Council of the Lateran, attempting to revive the black monks, whose fortunes had begun to wane, decreed that monasteries not belonging to an "order" were to be drawn out of their isolation by regular attendance at triennial general chapters convoked in each kingdom or province. One of the most important functions of such chapters was to appoint visitators who should regularly examine the life of each monastery and report back to the general chapter. Thus the universal Church for the first time required visitations as a means by which monasteries might help one another to maintain a fervent observance of monastic life.
- V 26. As has so often happened in monastic history, the implementation of the Lateran legislation was less than completely satisfactory because of numerous problems of the time. Another attempt, with further specifications, was made by the bull *Summi Magistri* of the Cistercian Pope Benedict XII in 1336. Again in the early fifteenth century the reforming activity that surrounded the councils of Constance and Basel produced further attempts at monastic renewal; these led to the formation of permanent unions of monasteries that began to be called "congregations." The oldest of these, established in Padua in 1419 and called the *Congregatio de Unitate*, has enjoyed a continuous existence to the present day; since the entry of Monte Cassino in 1504 it has been known as the Cassinese Congregation.
- V 27. The fifteenth-century congregations and others established after the Reformation sometimes elevated the general chapter to the place of supreme authority and made the role of visitators more important than it had been in the traditional monastic polity. Most of these were swept away in the suppressions that accompanied and followed the French Revolution. A return to tradition accompanied the reestablishment of monasteries and the formation of new congregations in the nineteenth and twentieth centuries. But ever since the Fourth Lateran Council/ the institution of the general chapter and provision for regular visitation have been the essential means by which monasteries strive to assist one another in the fulfillment of their common purpose.

## ***Section B: The Purpose of Monastic Visitations***

V 28. The overall purpose of monastic visitations is to help communities to grow in self-understanding, to recognize and acknowledge their own strengths and weaknesses, to identify what should be corrected or eliminated in their life, to help them solve their present problems, and to articulate the needs that should form their agenda of items for continuing examination. The precise services that they may contribute at any given time in history will inevitably depend upon the particular circumstances of that time.

### *1. The Visitation System in Our Time*

V 29. Monastic visitations are meant to help our communities evaluate themselves and be prepared to meet the future. Because of the far-reaching changes that have taken place in the Church and in our culture in recent years, there is a need today, perhaps as much as ever before in monastic history, for a monastic community to examine itself, to listen to its members, and to articulate its unique vision of itself, in order to enter into an uncertain future with strength to become what it ought to be.

V 30. When the members of the community engage regularly in such reflection upon their own community life, they are better prepared to utilize a visitation as an instrument for deepening their resolve to improve the quality of their life and for clarifying their vision of how this may best be done. In this context, the system of visitations in our Congregation can thus be of better service to each community, to the abbots of the various monasteries, and to the Church as a whole.

V 31. 1. It can serve the community by bringing closure to a study process that may have been undertaken or by guiding such a process into the next stage. As good listeners, the visitors may reflect back to the monks what they have said of their own community and critically examine their vision of themselves, offering correction of their perspective when this seems necessary.

2. It can help the abbot by formulating the visitation report as a commentary on the community's stated vision of itself. The abbot then can use the report as a guide for the community's ongoing self-study, as a source for stimulating community listening sessions and for his conferences to his community, and as an instrument of continuity between one visitation and the next.

3. Visitation can serve the entire Church because, in the context of the mystical body, the welfare of each monastic community is of concern to the whole Church. By helping a monastic community to be faithful to its calling to reappropriate the monastic tradition in a form suitable to our times and circumstances, a visitation furthers the progress of the Kingdom of God.

### ***2. The Functions of a Visitation***

V 32. In general, the visitation of a monastery is intended to offer an evaluation by outside examiners to stimulate the community to improve its common life and to begin or continue its own self-evaluation for the purpose of promoting ongoing growth. More

specifically, this overall purpose involves the following functions:

- V 33. 1. The visitation should offer a judgment upon the community's faithfulness to monastic tradition as set forth in the *Rule of St. Benedict* and in *The Constitutions and the Directory of the American-Cassinese Congregation*, as well as in the community's statements of its own ideals, as may be articulated in such documents as its customary or its mission statement and in formulations of its goals and policies.
2. The visitation should promote the growth of the community by drawing attention to the strengths it already enjoys and encouraging their further development, and by urging the ongoing *conversio* of the community as a response to their divine calling and to the signs of the times. The visitation report may function as an instrument to help the community achieve further development by providing a concrete expression of continuity in their efforts.
3. The visitation should allow the visitors and the community, by means of individual and group interaction, to identify the community's weaknesses and deficiencies and any evident discrepancies between theory and practice. The visitors will propose appropriate remedies, if needed, to help the community to become more authentic.
- V 33. 4. The visitation should provide, when necessary in serious cases, for the invoking of sanctions according to the proper law. Sanctions are invoked in exceptional cases in order to eradicate serious abuses or to achieve important goods that are essential to the welfare of the community.

### 3. *The Scope of a Visitation*

- V 34. The regular visitation is limited in its purview to the monastic affairs of the community. The visitors will ordinarily focus upon the specific aspect of the life that the community has chosen for a particular visitation or, if such a choice has not been made, upon its life in general. The specific concentration may be one that a previous visitation identified as a matter in need of further study. The choice of such a specific focus, however, in no way prevents an individual monk or a group of monks from addressing other aspects of the monastic life apart from this area (see V 8.2).
- V 35. In a regular visitation the visitors are not authorized to inquire into aspects of a community's life other than its monastic affairs, except insofar as they affect the integrity and peace of the monastic life. In a special visitation, however, they may be explicitly addressed if, in the judgment of the visitors, they are related to the community's current problems.
- V 36. The purpose of the monastic visitation is evaluation of the community and its life, not evaluation of the lives of individual monks. This latter task is rather the concern of the abbot and his delegates in the monastery. The concern of the visitors, however, should extend to satisfying themselves that the monks regularly receive the kind of support, encouragement, and correction that they need to make progress in the monastic life. It is appropriate, therefore, that individual monks experience the visitation as an opportunity to measure their own observance. When the behavior of an individual monk creates a problem that has a notable effect on the whole community, it necessarily falls within the

concern of the visitators.

- V 37. It can happen that serious matters, although not pertaining to the area chosen to be considered in a visitation, will nevertheless come to light in the course of the visitation. Such matters can and should be treated in the report to the abbot or in that to the community, or in , both, and a course of action may be suggested. Depending upon the gravity of the situation, such problems may be referred to the President and his council for decision as to how they should be handled.

## PART II

### THE VISITATORS

V 38. In the course of history, visitations of monastic houses have been conducted principally by local bishops and by monastic officials from other monasteries. Because the monastic way of life differs notably from the way of life of lay persons and diocesan clergy, and because autonomous monastic houses enjoy a measure of exemption from episcopal jurisdiction, monastic communities have generally found it more profitable to be examined by monks. These examiners are ordinarily drawn from other monasteries of the same congregations to which the monasteries to be visited also belong. Monastic congregations may reasonably be expected to have available, to a greater degree than would episcopal visitators, the resources of monastic ideals and experience necessary to assist their individual houses.

**D 128.1. 1. Any capitular of a monastery of the Congregation may be appointed as visitor. The President is to develop a roster of potential visitors from recommendations made by capitulars of the general chapter and from other sources.**

**D 128.1. 2. In the case of an ordinary visitation, the team of visitors is to consist of at least two members, one of whom is to be an abbot. A single visitor is to be assigned only in exceptional cases.**

#### ***Section A: The Qualifications of Visitors***

V 39. The careful selection of competent visitors contributes to the success of visitations. The choice of persons for this task should be made upon the basis of their ability as well as upon their freedom and willingness to perform this service to the communities of the Congregation, rather than upon the position that they occupy. A community should ponder the following considerations when requesting visitors/ and should specify any particular qualities and skills that they judge necessary for their visitation.

V 40. 1. *Information*

A visitor should be well-informed in those matters that it is his task to examine. He should have a clear comprehension of the elements of the religious and monastic life and of the context in which they have been lived in our monasteries. To this must be added, especially in times of rapid cultural and ecclesial changes, an acute awareness of the currents of thought and activity that influence our monasteries. An acquaintance with the general cultural conditions of the present day, with the movements that currently shape the life of the Church, and specifically with the ferment in contemporary religious and monastic life, is essential for making sound judgments about particular manifestations of these phenomena in the life of a specific community.

V 41. 2. *Assimilation of Values*

More decisive than purely conceptual knowledge is the personal assimilation of religious and monastic values that a visitor has acquired through actual experience (cf. RB 61). One who has personally lived the monastic life in a serious and dedicated fashion possesses a connatural understanding of it from within that enables him to approach the problems and challenges of others with sympathy and insight. The quality of practical wisdom derived from religious experience and serious reflection upon it is an indispensable prerequisite for an effective visitor.

V 42. 3. *Qualities of Personality*

In addition to these intellectual and spiritual qualifications, certain qualities of personality are eminently desirable in a visitor. Above all he should manifest a warmth, a patience, a willingness to listen and to learn, and an openness to legitimate diversity that will enable him to receive the monks who approach him with a genuine welcome and a radiant charity. While the prerequisite for this is an authentic humility, it also involves a question of style, a human quality of finesse that attracts rather than repels, that subtly communicates to others that they have been taken seriously even if their views or desires have not found acquiescence (cf. RB 31,13-14).

V 43. 4. *Preparation*

Those who are new to the task should show a willingness to prepare themselves for it through previous reflection, thorough assimilation of the material in this *Guide for Visitations*, and conferral with experienced visitors. It is to the advantage of the entire Congregation that its corps of visitors be continually renewed through the addition of new members. Those who have the requisite qualifications but lack experience should be assigned, at least the first time, together with one or more experienced monks or abbots, from whom they may learn much. Even those who have long experience, however, should keep an open mind so that each visitation may become for them an additional opportunity for learning.

V 44. 5. *Special Qualifications*

Particular circumstances in monasteries may require the choice of visitors with special qualifications. Monasteries located in other countries will usually require visitors who possess a fluent knowledge of the local language and culture. Larger, smaller, and very small communities have their own needs and problems, and ordinarily at least one of the team of visitors should be from a monastery of comparable size. Likewise, when particular apostolates have a strong influence upon the life of a community, it is desirable that one or more of the visitors should be from a monastery conducting a similar apostolate or at least should have had some background in this area. In the case of special visitations, it will often be desirable to include among the visitors one or more people with special expertise in the specific areas to be examined.

## ***Section B: The Selection of Visitators***

**D 128.1. 3. The procedure for the selection of visitators shall be as follows:**

- 1. The President, after consulting his council, is to assign a team of visitators for each monastery to be visited, taking into consideration the requests of the local community.**
- 2. The names of the proposed visitators shall be communicated to the abbot of each respective monastery.**
- 3. The abbot, after consulting his council, shall inform the President of his concurrence or shall make alternative suggestions.**
- 4. The final decision is to be made by the President.**
- 5. The President is to appoint one member of each team as chairman.**

V45. 1. *Eligibility*

Any perpetually professed monk of a monastery of the Congregation may be appointed a visitator. In a special case, a perpetually professed monk of any monastery of the Benedictine Confederation may be appointed a visitator. The President and his council should develop a permanent roster of visitators with diverse qualifications. To assist them in identifying qualified visitators for addition to this roster, written recommendations should be sought from capitulars of the general chapter and from the councils of seniors of each local community. This provision does not preclude recommendations from other sources. The President and his council are under no obligation to assign every monk suggested, and those visitators who are found ineffective should be removed from the roster.

V 46. 2. *The Process of Selection*

The process of selecting visitators for a regular visitation ordinarily begins with the abbot of the monastery to be visited, who, after taking into consideration the requests of the local community, proposes to the President the names of potential visitators or the particular qualifications desired. After consideration of these proposals and of the particular needs of the monastery, the President, after consulting his council, then communicates to the abbot the names of those whom he wishes to appoint. If these are different than those proposed by the abbot or not entirely suitable to him, the latter, after again consulting his council, may submit further proposals. The President is encouraged to continue this dialogue so long as it helps to assure the selection of those visitators best suited for each particular community. The final decision, however, rests with the President, after consultation with his council.

V 47. 3. *The Number of Visitators*

For regular visitations, the team of visitators will ordinarily consist half of governing abbots and half of other monks. It is left to the President and his council to determine whether a member of the council should participate in each visitation. In order to insure adequate attention to each community and its situation, at least two visitators should be

assigned to a community of average size, with four being provided for larger houses. A single visitator should be assigned only in exceptional cases, e.g., if the community is very small, the distance exceptionally great, or the language requirements such that another qualified visitator cannot easily be provided.

V 48. 4. *The Role of the Senior Visitator*

One member of the visitation team, who has had previous experience as a visitator, usually an abbot or a member of the council of the President, should be appointed by the President as senior visitator, responsible for coordinating the work of the visitation team. It is the responsibility of the senior visitator:

1. to communicate with the other visitators;
2. to communicate with the appropriate person at the monastery in regard to advance planning before the visitation;
3. to address the community at the opening of the visitation;
4. to arrange for meetings of the visitators among themselves and with monks of the monastery during the visitation;
5. to finalize the schedule of interviews;
6. to facilitate discussion of the report at the recessus, with the help of the other visitators;
7. to send the visitation reports to the President after the visitation and arrange for reimbursement of travel expenses for all the visitators.

## **PART III**

### **THE PREPARATION FOR THE VISITATION**

- D 128.2. 1. The abbot, with the consent of his council, determines whether the ordinary visitation of his monastery should be conducted at an interval of three, four, or five years after the previous ordinary visitation.**
- D 128.2. 2. At least a year in advance of the time thus determined, the abbot, after consulting his council, is to suggest to the President one or more suitable dates for the visitation.**
- D 128.2. 3. The President, in consultation with the visitors, then selects the date of the visitation and so informs the abbot.**
- D 128.2. 4. The abbot is to notify all the members of the community of the date of the visitation and the identity of the visitors in good time after receiving this information.**
- D 128.2. 5. Preparation for the visitation is to be determined by the local community and undertaken at an appropriate time.**
- D 128.2. 6. No less than two weeks before the opening of the visitation the abbot is to send to all the members of the community, including those stationed outside the monastery, a reminder of their rights and duties regarding the visitation, together with whatever information is available about the visitation schedule, especially about arrangements for scheduling an interview with the visitors.**
- D 128.3. At least one month before each scheduled visitation, each of the visitors is to receive from the abbot of the monastery to be visited a copy of the following documents:**
- 1. the reports made to the abbot and to the community, respectively, at the previous visitation;**
  - 2. the implementation report filed with the President within a year following the previous visitation;**
  - 3. a report on any preparations that have been made for the forthcoming visitation, and the results thereof.**
- V 49. Since the beginning of the renewal of visitation practice in the Congregation after the Second Vatican Council, it has become axiomatic that a monastery will benefit from a visitation only to the extent that it has prepared for it.**

The *Directory* refers to preparation in a context that seems to assume that the need for it is self-evident (D 128.2.5; D 128.3.3), but sets down no specific requirements, leaving the matter entirely to each community. In fact, a great variety of methods has been employed by different communities, and there has been some lack of clarity about the concept of preparation and its purpose. It seems useful, therefore, to attempt some clarification of this question and to distinguish different types of preparation.

### ***Section A: Ongoing Community Reflection as a Form of "Preparation"***

- V 50. Every monastic community has an ongoing duty to listen to the Spirit and to reflect upon its life. To do this is, indeed, incumbent upon each monk, but also upon the community as a whole, for the group needs to have a clear vision of its call and of how it intends to respond to it (*RB* 72,7-12). Today communities have a particular need to engage in such reflection because of the changes that have taken place in society. They may find it helpful to use more structured methods to achieve this than were used in the past; though such methods have often been designed for secular institutions, they are simply tools that can also be used profitably by monasteries. Obviously, each of them needs to be understood in the light of our monastic heritage and carried out in a way that respects monastic values and aims to realize them more fully.
- V 51. In fact, it is inexact to refer to such community reflection as "preparation for visitation" insofar as this is not its proper finality. The community engages in such activity in order to further its own renewal and plan its future, not because it is going to be examined on the results. In fact, the process of reflection is itself often more valuable to the community than any concrete results that may be produced. Nevertheless, there is a close relationship between community reflection and visitation. In practice, an approaching visitation often provides the stimulus for undertaking such a community process, just as tests are an incentive for students to study harder. Successive visitations also provide an opportunity for periodic review and adjustment of the community's progress. Hence the *Directory's* reference to community reflection appears under the category of "preparation for visitation" and this *Guide* follows the *Directory*, while recognizing the ambiguity.
- V 52. Therefore, while a community does not engage in reflection on its life primarily in order to prepare for visitations, the two things may work together in a three-to five-year cycle in contributing to the higher common purpose of the community's growth. If a community is regularly engaged in such efforts, it will then find, upon the approach of a visitation, that it is not required to begin some special ad hoc "preparation," but need simply articulate what has been done on an ongoing basis since the last visitation.
- V 53. Since each monastery is unique, every community will have to discover for itself what kind of reflection is best suited to its own needs. What follows here is simply a listing of some possible methods of helping a community come to terms with itself and make progress in solving its problems, planning its future, and furthering its ongoing conversion. These are alternative suggestions; none of them need be followed, but a community may find one or

the other of them appropriate for its present situation.

- V 54. 1. **A Self-Study Program.** The community may undertake a program that will enable it to assess its strengths and weaknesses and evaluate its history, its opportunities, and existing threats to its well-being, in order to gain a comprehensive sense of itself and of the shared responsibility of its members for who they are and who they are called to be.
- V 55. 2. **A Mission Statement.** The community may initiate a process to clarify its mission. The monks will need to share their understanding of their monastic values and service, leading to a communal expression of their mission that will succinctly articulate why they exist, who they are, and what thrust they have toward the future. Community discussion of this statement as it develops will enable them to share the sources and meaning of the statement and how it touches the lives of each person and the life of the community as a whole.
- V 56. 3. **A Strategic Plan.** Such a plan is a blueprint for a course of action designed to achieve certain defined goals within a given time frame. Ordinarily such planning should be for a five-year period. The community, after agreeing upon the goals that they hope to reach, will then need to designate the activities necessary to accomplish what they wish to achieve, the persons responsible, a time line specifying beginning and completing dates for each stage of the process, and the means by which the recommendations may be effectively carried out.
- V 57. 4. **A Study of Monastic Observance.** The community may focus upon a particular monastic observance, such as its observance of poverty or silence, or the quality of its divine office or conventual Mass. The members will then evaluate their present practice and determine how they may proceed to improve it and thereby promote the deepening of their life in the Spirit. A study such as this may be undertaken as the result of one of the other processes considered here.
- V 58. 5. **A Review of the Previous Visitation.** The community may need to get in touch with its last previous assessment of its quality of living. It may require a deepening of consciousness about the most recent visitation. The following are some of the ways in which this may be effected:
1. The last visitation report and the *Guide for Visitations* may be read at table and copies may be made available for the monks.
  2. The abbot, other superiors, the council of seniors, and significant committees and boards may prepare and present an appraisal, from their own perspective, of the community since the last visitation.
  3. Each monk may be asked to prepare an assessment of his monastic experience of the community since the last visitation.
  4. Small group discussions, summaries of which should then be presented to the entire community, may enable the community to identify issues and select areas upon which they need to focus, in receptivity to hearing God's will for them.

## ***Section B: The Spiritual Dimensions of Preparation***

- V 59. The quality of a community's life constitutes its response to a special call to holiness (cf. *Lumen Gentium* 43-47 and *Perfectae caritatis* 5), the fruit of grace that frees people for God's service by making them a sign of the holiness of the Church in the situation in which they find themselves. To discern this spiritual vitality and its radiance requires of the community prayer, fasting, and openness to the call of the Holy Spirit. Moreover, the community itself will need to be purified from self-interest and human pressures and to move from inertia to an active searching for God's will.
- V 60. The message of God's will entails more than the common human awareness that we need to speak frankly and openly with each other. Seeking God's will in the concrete situation of our strengths and weaknesses means being open to the folly of the cross (1 Cor 1,18) and acknowledging that Jesus is Lord (1 Cor 12,4), being ready to change and be changed. Without a strong preparation of prayer, fasting, and openness to the Holy Spirit, no sacred space of faith will be created, and there will be no genuine dialogue to enable the Spirit to renew the community by creating new perspectives, new perceptions, new understandings, and new enthusiasms that bring about new decisions, leading to renewed life.
- V 61. Not only does the fear of the cross need to be removed, but courage is needed to express opinions gathered from insight and experience that focus not on the expedient thing to do, but on God's will. This places the community under the mystery of God's ways and allows decisions to affect and effect sacred history. Restoration and renewal are God's work; the community's task is to be disposed to listen and to heed his movements within them.

## ***Section C: The Practical Dimensions of Preparation***

### V 62. 1. *The Visitation Committee*

Although it is not prescribed by *The Constitutions and the Directory*, the abbot may appoint a visitation committee to coordinate the details of the visitation. This is usually done after consultation with the council of seniors. The council of seniors may itself act as the visitation committee, or the abbot may appoint a special committee composed of some or all of the seniors together with other monks. Such a committee would be responsible for the following functions in regard to the visitation itself:

1. To prepare the pre-visitation report that is sent to the visitators (see V 64).
2. To arrange that each monk fill out a form containing information that can facilitate his interview with the visitators. Such a form should contain information about his age, ministries, education, and similar data, and provide space for him to comment on the focus of the visitation and to list other matters that he wishes to discuss.

3. To schedule events during the visitation itself in collaboration with the senior Visitor and the abbot.
4. To arrange appropriate times for group or individual interviews.

V 63. If the committee is also in charge of guiding a study process, it may fulfill these additional functions:

1. To propose the focus of the approaching visitation and the mode of preparation most suitable to the circumstances.
2. To plan and direct the process to be used, to create study committees, develop procedures, and coordinate committees as required.
3. To engage consultants and, if necessary, to commission reports on the chosen area of focus.
4. To present preliminary work to the community for their suggestions, revision, and eventual approval.

V 64. *2. The Previsitation Report*

A previsitation report or assessment should be prepared for the use of the visitors, setting forth in some detail an account of what has happened in the community since the previous visitation and an evaluation of the community's monastic life in the area of its selected focus. This report should include an outline of the community's reflection and its results and should disclose whether the community's expectations were realized or had to be curtailed. It should also incorporate any materials produced in pursuing one of the methods of reflection (e.g., a mission statement or a strategic plan) and any other relevant materials resulting from the process. The preparation of this previsitation report will ordinarily be the responsibility of the visitation committee or of someone specifically designated by the abbot, and it should be approved by the council of seniors.

V 65. *3. Documents Sent to the Visitors*

The abbot is responsible for seeing that copies of this previsitation report are forwarded to all the members of the visitation team at least one month before the scheduled visitation, but he may assign this task to the visitation committee. Copies of the following should also be sent with it:

1. the visitors' report to the community from the last previous visitation;
2. the one-year report on the implementation of the previous visitation;
3. a schedule showing the frequency of meetings of the chapter, the community, the council of seniors, and significant committees during the intervening years;
4. a list of the present members of the community, giving their ages, assignments, and places of residence.

V 66. In addition, the abbot himself should send:

1. the abbot's report from the previous visitation;
2. a brief report disclosing the frequency of his conferences to the community, the frequency of his regular meetings with each member of the community, and any special initiatives undertaken in his leadership role.

## PART IV

### THE VISITATION PROCESS

**C 127.1. An ordinary visitation of each autonomous monastery of the Congregation is to be held at intervals of not fewer than three and not more than five years according to the procedures established in the proper law of the Congregation.**

**D 128.4. Sufficient time should be available for the visitation, according to local needs and circumstances, to give unhurried attention to all aspects of the process.**

#### ***Section A: The Frequency and Length of Visitations***

V 67. 1. *Frequency.* The Congregation conducts the ordinary visitation of a monastery at an interval of not less than three and not more than five years. The abbot/ with the consent of his council, determines the interval and informs the President. The interval may vary at times, depending upon circumstances, e.g., the recent election of an abbot, a recent special visitation, or the conclusion of a study process. The interval should be long enough to permit the integration of the previous visitation and the conducting of a new process. The rhythm established should also be sufficiently relaxed that the monastery is not always involved in introspection and self-examination.

V 68. 2. *Scheduling.* About a year before the time when the visitation should take place, but prior to the fall or spring meeting of the council of the President, the abbot, after consulting with his council of seniors, tentatively schedules the dates of the visitation with the President.

V 69. 3. *Length.* Normally a visitation is not scheduled for more than seven days.

#### ***Section B: The Beginning of the Visitation***

**D 128.5. At the beginning of the visitation:**

**D 128.5. 1. The chairman of the visitation team is to address the community regarding the nature and method of the visitation.**

**D 128.5. 2. The abbot is to submit to the visitators for their inspection:**

- 1. the minutes of the meetings of the chapter, of the quasi-chapter of any dependent houses, of the council of seniors, and of any significant committees;**
- 2. a list of all the members of the community and their assignments;**
- 3. any other pertinent documents requested by the visitators.**

V 70. 1. *The Arrival of the Visitators.* The visitators should arrive at least one-half day prior

to the opening of the visitation, so that they may become acquainted with the local community and may have an opportunity to confer with each other.

- V 71. 2. *The Initial Meeting.* Prior to the opening of the visitation, the visitators should meet with the abbot or the visitation committee to finalize the schedule of events and the procedures. The visitators should then inform the abbot of the finalized schedule and discuss with him any issues that may need to be dealt with prior to the opening of the visitation.
- V 72. 3. *The Examination of Documents,* The visitators should request now, though they are free to do so at any time during the visitation, any documents that may help them better to understand the community's pre-visitation report or any issues confronting the community. Except during a special visitation, however, the financial documents of the monastery are not to be a part of the visitation, because these are reviewed annually by the President and his council with the assistance of the financial counselors of the Congregation.
- V 73. 4. *The Opening Prayer.* The visitation proper begins with special prayers that may be incorporated into the monastic hour of prayer just prior to the opening of the visitation or into the conventual Eucharist, according to the custom of the monastery (see Appendix 2).
- V 74. 5. *The Opening Meeting.* The abbot and community assemble together with the visitators for the opening of the visitation. The senior visitator addresses the community. Among other things, he should introduce the visitators or permit them to introduce themselves, and explain the schedules and the procedures to be used. He assures the monks that confidentiality will be maintained by the visitators in all appropriate matters, especially in regard to information communicated during the personal interviews.

### ***Section C: The Interviews with the Visitators***

- D 128.5. 3. The visitators are to meet separately with the abbot and with the council of seniors.**
- D 128.6. 1. Each member of the community, including juniors, novices, and postulants, is to avail himself of the opportunity for an interview with the visitators. Those who do not present themselves spontaneously may be summoned by the visitators.**
- D 128.6. 2. Monks stationed outside the monastery who are unable to come for the visitation may submit comments in writing or be interviewed by telephone. The visitators may also, to the extent that this is feasible, go to visit those who are stationed in the vicinity of the monastery.**

**D 128.6. 3. Monks who are involved in the same work or who share similar concerns, and whose common interests may affect their monastic life, may request a group meeting with the visitators.**

**D 128.7. Visitators have an obligation to preserve the confidentiality of any information imparted to them that is of a confidential nature.**

V 75. 1. *The Abbot and the Council of Seniors.* All of the visitators together meet first with the abbot and then with the council of seniors in the absence of the abbot. The visitators may also interview other officials of the monastery. These meetings and interviews should deal with the focus of the visitation and any special problems.

V 76. 2. *The Interview Teams.* For group meetings and individual meetings, the visitators should be divided into teams of at least two persons. They are to keep written notes on the interviews.

V 77. 3. *Group Meetings.* The visitators are encouraged to hold discussions with small groups of monks. These groups may be based upon deaneries, living areas, work assignments, or any other grouping that may facilitate discussion. If possible, teams of visitators should meet with groups of monks who live away from the monastery. Normally such group discussions will focus upon the community's previsitiation report, and may begin with the visitators' asking some introductory questions. The visitators should avoid asking judgmental questions or making statements during the discussion. They should facilitate the discussion, but be open also to the discussion of issues that are not contained in the community's previsitiation report.

V 78. 4. *Committees.* The visitators may also meet with appropriate monastery committees.

V 79. 5. *The Individual Interviews.* The visitators are to provide the opportunity for individual interviews with each monk. Normally these interviews take place in person, but for a good reason may take place by telephone, and monks who are at a great distance may send their views to the visitators in writing.

Postulants, novices, and claustral oblates as well as professed monks have a right to a personal interview with a team of visitators. A person who does not present himself for an interview may be summoned by the visitators. A personal interview is ordinarily scheduled for thirty minutes, but may be shorter. If necessary, a person may schedule himself for more than one thirty-minute period. Any information provided during the personal interviews is subject to the degree of confidentiality appropriate to the nature of the information. Confidentiality extends also to written materials provided for the visitators and to notes and reports produced by them.

V 80. 6. *Interviews with Other Persons.* The visitators may interview persons who are not members of the monastery, but who may help to provide insights into the community's previsitiation report and the life of the monastery. Such persons may be co-workers of the monks or members of boards that govern the monastery's works. These interviews may be particularly useful during a special visitation that is concerned with finances or the viability of the monastery.

V 81. 7. *The Daily Meeting of the Visitators.* The visitators should meet daily, usually at the end of each day, to share information, to exchange impressions, and to make any necessary adjustments in the visitation schedule. They should make note of items that seem to deserve inclusion in the visitation reports.

### ***Section D: The Visitators' Reports***

**D 128.8. 1. At the conclusion of the visitation the visitators are to provide two written reports, one for the abbot and one for the chapter.**

**D 128.8. 2. The report for the abbot is to be discussed privately with him by the visitators.**

**D 128.8. 3. The report for the chapter is to be discussed first with the abbot and then with the council of seniors, and their reactions should be considered in preparing the final draft for the chapter. This final draft is to be made available to the community in writing and, after they have had sufficient time to examine it, is to be discussed with them at a community meeting.**

**D 128.8. 4. A copy both of the report for the abbot and of the report for the community is to be forwarded to the President by the senior visitator immediately after the visitation.**

**D 128.8. 5. The judgments of the visitators expressed in their reports may be classified according to the following categories:**

**1. commendations, which recognize and commend favorable trends in the community's life and encourage their further development;**

**2. observations, which draw attention to problems that do not directly concern the central monastic witness of the community and, while they may be important, are not of a serious or urgent nature in themselves;**

**3. directives, which in more serious or urgent cases define specific problems and impose the obligation to seek solutions to them;**

**4. mandates, which in the case of very serious problems or abuses define specific solutions that the community is obliged to adopt, with due regard for the prescription of D 128.8.6.2.**

**D 128.8. 6. 1. Directives promulgated in the visitation reports are effective immediately.**

**D 128.8. 6. 2. Mandates expressed in the visitation reports take effect only when they have been confirmed by the President, with the consent of his council, and when the President has notified the community of their confirmation.**

- V 82. 1. *The Written Reports.* The visitators are to prepare two written reports, a confidential report to the abbot alone and a report to the community. These reports normally address only the areas chosen by the community for the focus of the visitation, but may also address other areas if appropriate. The report may suggest areas that need to be addressed by the rat community and may thus make proposals for the next visitation. The reports should include the following:
1. The visitators' reactions to the community's pre-visitation report.
  2. Their comments on other areas, if appropriate.
  3. Their formal judgments about the life of the community.
- V 83. The report to the abbot should be of the nature of an evaluation of his abbatial service, both containing positive comments and pointing out areas of weakness where improvement changes, or help may be necessary. Issues that concern a particular monk may also be brought to the notice of the abbot.
- V 84. 2. *Formal judgments.* Formal judgments must be written clearly and specifically so that each written judgment is readily understandable to the abbot and the community, to the President and his council, and to the next visitation team. These judgments include the following:
1. **Commendations**, which recognize and commend favorable trends in the community's life and encourage their further development.
  2. **Observations**, which draw attention to problems that do not directly concern the central monastic witness of the community and, while they may be important, are not of a serious or urgent nature in themselves.
  3. **Directives**, which in more serious or urgent cases define specific problems and impose the obligation to seek solutions to them. Directives are effective immediately upon the issuance of the report.
  4. **Mandates**, which in the case of very serious problems or abuses define specific solutions that the community is obliged to adopt. Mandates are proposed to the abbot and the community and to the President and his council; they take effect only after the President, with the consent of his council, affirms or modifies the mandates and so informs the abbot and community.
- V 85. Since the proper law requires that each directive or mandate be fulfilled within one year of the closing of the visitation, unless otherwise specified by the visitators or by the President, the visitators should indicate in the report the exact date by which each directive or mandate is expected to be fulfilled.
- V 86. 3. *The Review of Reports by the Abbot.* After both reports are completed, but before distribution of the report to the community, the visitators meet with the abbot to discuss both reports and to receive his comments on the report to the community. The abbot may suggest changes in either report, but the final determination is up to the visitators.
- V 87. 4. *The Review of the Community Report by the Council of Seniors.* Before the general

distribution of the report to the community, the visitators distribute **it to** the members of the council of seniors. The visitators **then** meet with the council of seniors to discuss the report and to receive their comments. The seniors may suggest changes in the report, but the final determination is up to the visitators.

- V 88. 5. *The Distribution of the Community Report.* The written report to the community should be distributed in sufficient time for the monks living at the monastery to study it prior to the community meeting with the visitators. At the close of the visitation, it is the responsibility of the visitation committee or of the abbot to see that copies of the report are sent to all professed monks living away from the monastery.
- V 89. 6. *The Community Meeting.* For the closing of the visitation, the visitators meet with the community to discuss the report. Small group discussions of the report may be arranged prior to the meeting of the whole community. At the community meeting it may be helpful for members of the council of seniors or of the visitation committee to be prepared with questions or statements to initiate the discussion. Normally the visitators should not read the report to the community, since it is assumed that the members have already studied it. The meeting should close with prayer (see Appendix 2).

## PART V

### THE IMPLEMENTATION OF THE VISITATION AND SPECIAL QUESTIONS

#### *Section A: The Process of Implementation*

**D 128.8. 7.** The office of the visitators ceases when they have submitted their reports to the President. The President, however, may consult them in regard to matters that may arise in the implementation of the judgments that result from the visitation.

**D 128.8. 8.** After examining the visitation reports, the President, with the consent of his council, may in more serious cases impose alternate or additional directives or mandates upon a monastery.

**D 128.8. 9.** If there are serious difficulties on the part of the local community about the fulfillment of the directives or mandates mentioned in D 128.8.6 and D 128.8.8, the abbot, with the consent of his council, is to communicate these problems or objections to the President within thirty days.

**D 128.9.** The implementation of a visitation is to comprise the following steps:

**D 128.9. 1.** Within a month after the close of a visitation, a report on the visitation process itself and on the visitators is to be submitted to the President by the abbot, after consulting his council. Upon request, a visitator may receive from the President a summary of the community's estimate of his performance.

**D 128.9. 2.** All directives and mandates are to be fulfilled within one year, unless another deadline has been specified by the visitators or by the President.

**D 128.9. 3.** Within a year after the visitation, unless the President specifies an earlier date, the abbot, after consultation with his council of seniors, is to send a report to the President to inform him of what steps have been taken to implement the visitation.

**D 128.9. 4.** If a directive or mandate has not been carried out within the time specified, or if the abbot and the monastic chapter or council of seniors request postponement or cancellation of it, it is the responsibility of the President to determine the most appropriate course of action in the circumstances.

**V 90. 1.** *The Sending of the Reports to the President.* Within a week following the close of the visitation the senior visitator is to forward a copy of both reports to the President. If a directive has been given or a mandate has been proposed by the visitators, the senior

visitor in a cover letter should inform the President of the directive or the proposed mandate and explain the reasons why the visitors gave the directive or are proposing the mandate.

- V 91. 2. ***The One-Month Report.*** Within one month after the close of the visitation the abbot, after consulting his council of seniors, is to send a report to the President. The report should address the following areas:
1. Evaluation of each of the visitors;
  2. Evaluation of the process of the visitation;
  3. Evaluation of the visitors' two reports in general;
  4. Objections to or proposals for implementation of any of the judgments made by the visitors;
  5. Request and reasons for a time extension for implementation of a judgment, if applicable.
  6. Suggestions for improvement of the visitation process in general, or for his monastery in particular.
- V 92. 3. ***The Meeting of the Council of the President.*** At the next meeting of the council of the President, the visitors' two reports and the one-month report of the abbot are to be evaluated. The President, with the consent of his council, may then impose alternate or additional observations, directives, or mandates, and so inform the abbot. In particular cases that require immediate action, especially if the visitors recommend a mandate, the President should hold a meeting of his council by conference call.
- V 93. 4. ***The One-Year Report.*** After a year has elapsed since the close of the visitation, the abbot, after consulting his council of seniors, is to submit a report to the President and his council indicating how the community's pre-visitation report and the visitors' reflections have been used to enhance the monastic life of the community. In addition, he should indicate how each observation, directive, or mandate has been fulfilled. In the report the abbot, with the consent of the monastic chapter or the council of seniors, may request an extension for the implementation of any directive or mandate. His request should contain the reasons for the request and an account of how the judgment has been fulfilled up to the time of the request.

### ***Section B: Special Visitations***

- C 127.2.** If special circumstances arise in a community, a special visitation may be requested either by the abbot of that monastery or by a majority of the members of the council of seniors, after they have informed the abbot.
- C 127.3.** The President, with the consent of his council, may require a special visitation when circumstances indicate that this would be beneficial.
- D 128.1. 4.** In the case of a special visitation (C 127.2 and C 127.3), the visitation team is to consist of a minimum of three members, including the President and at least one

**member of his council.**

- V 94. The President, with the consent of his council, may schedule a special visitation at his own initiative or at the request of the abbot or of a majority of the members of the council of seniors, after they have informed the abbot. The dates and purpose of the special visitation are determined by the President, with the consent of his council, after consultation with the abbot of the monastery. Usually the team for a special visitation is headed by the President himself, and normally it also includes at least one member of his council. However, the number and identity of special visitors is determined by the President on the basis of the particular needs of the community.

### ***Section C: The Visitation of Dependent Monasteries***

**D 128.10. 1. The ordinary visitation of a dependent monastery is the responsibility of the abbot of the founding monastery, acting either personally or through others.**

**D 128.10. 2. The visitation of a dependent monastery by the Congregation is to be undertaken only when requested by the abbot of the founding monastery, by the quasi-chapter of the dependent house with the approval of the abbot, or by the visitors of the founding monastery.**

- V 95. A visitation of a dependent monastery by the Congregation may be requested by the abbot of the founding or adopting monastery, by the quasi-chapter of the dependent house with the approval of the abbot, or by the visitors of the founding or adopting monastery. The President, after consulting with his council, decides on the appropriateness of the visitation. The visitation is conducted according to this *Guide* with the appropriate adaptations.

### ***Section D: The Cost of Visitations***

**D 128.11. 1. The expenses of the visitors are paid by the Congregation. Each monastery visited will reimburse the Congregation an amount to be periodically determined by the President with the consent of his council.**

**D 128.11. 2. The expenses of a visitation of a priory dependent upon an abbey of the Congregation are paid by the founding abbey.**

- V 96. The expenses of the visitation of an autonomous monastery are paid by the Congregation. This cost is partially covered by reimbursement from the monastery to the Congregation, which should be sent to the President within a month after the visitation has been completed. The amount of the reimbursement, set periodically by the President with the consent of his council, is the same for all monasteries. The entire expense of the visitation of a dependent monastery is paid by the monastery upon which it is dependent.

V 97. Reasonable efforts should be made to keep the costs of travel as low as possible by taking the cost factor into consideration both when visitations are scheduled and when travel arrangements are made by the visitors.

## APPENDIX 1

### FORMULAE FOR USE IN REPORTS

#### ***1. Directives.***

*When the visitators issue a directive in their report to the community or to the abbot, it should be in the following form:*

We give the following directive:

*[The directive itself should be stated clearly and precisely.]*

This directive is effective immediately and must be fulfilled within one year.

*or*

This directive is effective immediately and must be fulfilled by *[date]*.

#### ***2. Mandates.***

*When the visitators propose a mandate in their report to the community or to the abbot, it should be in the following form:*

We propose to the President and his council for confirmation the following mandate:

*[The mandate itself should be stated clearly, precisely, and with the specific actions that must be fulfilled.]*

This mandate becomes effective when the President notifies the abbot and community of its confirmation. The mandate must be fulfilled within one year from the date of notification of confirmation. (Or: The mandate must be fulfilled by *[date]*.) The abbot and community have a right to communicate with the President concerning the imposition of this mandate.

#### ***3. Conclusion of Reports.***

*The visitators' reports, both the report to the community and that to the abbot, should conclude as follows:*

#### IMPLEMENTATION

Within one month from today Abbot N., after consulting with the council of seniors and, if he deems it fitting, with the community, is to submit to the President of the Congregation a report on the visitation process itself and on the visitators (D 128.9.1).

Within a year after this visitation Abbot N., after consulting with the council of seniors, is to submit a report to the President of the Congregation indicating what steps have been taken to

implement this visitation report (D 128.9.3).

*// any directives have been issued in the report, the following should be added:*

Any directives issued in this report are to be fulfilled within one year unless another deadline is specified by the visitors or by the President (D 128.9.2).

*If any mandates have been issued in the report, the following should be added:*

Any mandates proposed in this report become effective only upon confirmation by the President, with the consent of his council, and notification of this to the community (D 128.8.6). Mandates are to be fulfilled within one year unless another deadline is specified by the visitors or by the President (D 128.9.2).

## APPENDIX 2

### PRAYER FORMULAE FOR VISITATIONS

#### ***A. THE OPENING OF THE VISITATION***

*The opening of the visitation may take place in choir during or immediately after an hour of the divine office. In this case it is not necessary to mark the occasion with a special rite. If, however, the opening takes place at another time, and perhaps also in the chapter room or some other place, the following may be used.*

*The senior visitator or another visitator may preside, tie or a chanter intones the Veni Creator or another appropriate hymn, the verses of which are then sung by the community in the usual way. After the hymn, one of the following orations is said or sung.*

Let us pray.

Almighty God, our helper in every need,  
be powerfully present in our midst  
as we begin this visitation.  
Confirm us in doing what is right and just in your sight,  
and guide us in following more closely  
the teaching of our holy father Benedict.  
Strengthen your servants in the truth  
and inspire us to prefer nothing to the love of Christ.  
We ask this through the same Christ our Lord. Amen.

*or*

Let us pray.

Lord Jesus Christ,  
you are the one King  
whom we serve in this and every place.  
As we come together to examine our monastic life  
pour out on us the Spirit of truth.  
Give us light to know your will for us,  
insight to understand it clearly,  
and strength to follow it in confidence.  
Blest are you, Lord Jesus,  
both now and forever. Amen.

*or*

Let us pray.

Ever-faithful God,

your Son promised to be with us who gather in his name.

As we assemble for this visitation, make us aware of his presence among us and fill us with his grace, mercy, and peace. In all we do or say may we know the truth and live in love and so grow together as a school for your service. We ask this in the name of Jesus the Lord. Amen.

*The senior visitator then addresses the community and introduces the other visitator or visitators, or invites them to introduce themselves. At the end of the session, another of the above orations may be said in conclusion.*

## **B. THE CLOSE OF THE VISITATION**

*The final meeting of the visitators with the community is held in the chapter room for the discussion of the report to the community.*

*When the proceedings have been concluded and the visitation is to be closed, the Te Deum or another appropriate hymn is sung by the community after being intoned by the senior visitator or another visitator, or by a chanter. After the hymn, one of the following orations is said or sung:*

Let us pray.

Gracious God,

as we conclude these days of visitation,  
we pray to you for this community.

Fill it with your truth.

Keep it in your peace.

Where it is strong in serving you, sustain it.

Where it is weak, strengthen it.

Where it is in error, correct it.

Where it is in want, provide for it.

Where it is divided, reunite it.

We ask these blessings in the name of your son, Jesus Christ,  
who lives to bring us all together to the life that lasts for ever and ever. Amen.

*or*

Let us pray.

Loving God,

we thank you for these days of visitation,  
in which we have examined our monastic life and observance.

Help us strive with all our hearts to do what is pleasing to you  
and to persevere in doing this all our days.

As we hasten toward our heavenly home, be our strength and protection along the way. We ask  
this through Christ our Lord. Amen.

*or*

Let us pray.

Lord God,  
through the life and teaching of St. Benedict,  
you have called many to search for you  
in the monastic way of life.  
Accept our prayer as we end these days of visitation.  
Sustain us in your service as we say: Amen.

- May we live by faith. Amen.
- May we take up our cross daily. Amen.
- May we be hearers of the word. Amen.
- May we be doers of the word. Amen.
- May we be steadfast in trials. Amen.
- May we show forgiveness when wronged. Amen.
- May we be untiring in prayer. Amen.
- May we give obedience from the heart. Amen.
- May we strengthen the bonds of brotherhood. Amen.
- May we be joyful in hope. Amen.
- May we bear fruit in charity. Amen.
- May we be firmly grounded in peace. Amen.

Rejoicing in the fellowship of all who love Christ, let us unite our voices in the prayer that he gave us:

Our Father. . .

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