

Annual Report from the Local Fraternity to the Region

Year Ending December 31, _____

Number/Name of Fraternity: /

Please mail to: Terry Barber, 5933 Capitol Forest Drive SW, Olympia, WA 98512 or email: tbarbersfo@gmail.com

1. **Demographics:** Number: _____ Name of Fraternity: _____
Gathering day, time & place: _____ Frequency of Council Meetings: _____
Dates Last Election: _____ Fraternal Visitation: _____ Pastoral Visitation: _____

Please enter numbers for the reporting year for the following:

1. **Total Professed Membership***: (Includes Satellites, newly forming & emerging/react groups):

Active*: _____ Excused*: _____ Inactive*: _____

** "Active" includes active members and those excused from obligations
"Inactive" includes lapsed, withdrawn, suspended, or dismissed
Transferred or deceased are not listed.*

1a. **Fraternity Fair Share Professed** = Total Active + Total Excused x \$50 1a.

1b. **Fraternity Fair Share Candidates** = Total Candidates x \$ 17 1b.

1c. **Total Fraternity Fair Share** = 1a. + 1b. =

Fraternity Demographic Stats: (Enter total for all parts of the fraternity)

Candidates: _____ Inquirers: _____ Orientation: _____ Affiliates: _____

Membership Demographic Breakdown by Type: (Sponsoring Fraternity, satellites, NFGs Emerging/reactivating communities)

2. Number of OFS Permanent Deacons:

Number of OFS Diocesan Priests:

3. Developing Communities: (Supported by main fraternity)

Satellites: Emerging: Newly Forming: Youth Groups:

4. Community and Type:

A. Parent/sponsor - Fraternity name _____

Professed+excused: Candidates: Inquirers: Orientation: Affiliates:

- a. Number of men (professed + excused + candidates):
- b. Number of women (professed + excused + candidates):

B. First Sponsored group (identify satellite, NFG, emerging/reactivating): _____

Professed+excused: Candidates: Inquirers: Orientation: Affiliates:

- a. Number of men (professed + excused + candidates):
- b. Number of women (professed + excused + candidates):

C. Second sponsored group: (Identify type) _____

Professed+excused: Candidates: Inquirers: Orientation: Affiliates:

- a. Number of men (professed + excused + candidates):
- b. Number of women (professed + excused + candidates):

D. Third sponsored group: (Identify type) _____

Professed+excused: Candidates: Inquirers: Orientation: Affiliates:

- a. Number of men (professed + excused + candidates):
- b. Number of women (professed + excused + candidates):

5. Top Three Dominant Languages Spoken in Your Fraternity:

1 st	Quantity:	Percentage:
2 nd	Quantity:	Percentage:
3 rd	Quantity:	Percentage:

6. Attendance at Gatherings: (Please tell us about your attendance. Are there any continual delinquencies? If there are non attendees, how does the council respond?)

7. **Fraternity Membership Changes During Previous Year:**

- a. **Deaths:**
- b. **Lapsed:**
- c. **Definitive voluntary withdrawal:**
- d. **Temporary suspension:**
- e. **Dismissal from Order (Can only be approved by Region):**

Spiritual Assistant

Current Appointed Spiritual Assistant: Friar: Sister: OFS:

Who is your Spiritual Assistant:

Name: Date appointed:
Address:
Phone #
e-mail

Spiritual Assistant Affiliation: (Circle one)

- | | |
|------------------|----------------------------|
| OFM | Poor Clare |
| OFM Cap | 3rd Order Religious |
| OFM Conv | Priest or Deacon |
| TOR Friar | Secular Franciscan |

Has current SA completed the Family Connection Course or other course with the RSA?
Explain:

Is current SA certified by the RSA?

What is their certification date:

How long (years) has your Spiritual Assistant been appointed to your fraternity?

Have you provided your assistant with current documents:

- a. Family Connections (Revised and expanded 2011)
- b. Statutes for Spiritual Assistants (Rome 2009)
- c. Handbook for Spiritual Assistance to the SFO (Rev. 2012)

How does the Spiritual Assistant participate in the council and chapter meetings?

What is his/her contribution:

To fraternal life?

To formation?

Number and Names of OFS members in fraternity who have completed SA Training:

Number and Names of OFS currently enrolled in the Franciscan Family Connections Program:

❖ **Please describe any changes (additions/resignations/appointments) in your council since last election and reasons for the changes.**

❖ **Who is your national database contact person? (Regional contact - Regional Secretary)**

Name:

Address:

Phone #

e-mail

Are all professed members receiving the TAU-USA and the Troubadours newsletter?

Formation: (Regional contact - Regional Formation Director)

❖ List the members of the Formation team (include name, address, phone, e-mail):

❖ What materials do you use for Orientation?

❖ List Initial Formation texts (Inquiry & Candidacy in particular) used:

- *If you are using older materials **(not on attached formation resource list)** please provide book title, authors and date of publishing so the Region Formation Director and REC can assess suitability for use in initial formation (inquiry and candidacy)!*

❖ List Ongoing Formation texts (and other materials used)

❖ **Formation Narrative – Input required from the Fraternity Council and Formation Team! How is the council involved in formation?**

- **How is the fraternity council involved in initial formation?**
- **Please describe how your Fraternity is incorporating the topics developed in the “For Up to Now” Manual in BOTH initial and ongoing formation.**
- **How can the REC better assist/support this transition?**
- **Please describe any issues/resistance to working the new topics into your formation.**

❖ **Fraternal Life: (Regional contact - Councilor for Fraternal Life)**

Fraternal life: What are your yearly programs/events? New programs/events?

How does the council as a whole “animate & guide” the fraternity?

What is your “presence” in the world and the Church?

How do you stay in contact with/take care of “isolated members”? (CIOFS uses the broadest interpretation of the word “isolated” to include homebound, nursing home, inactive and far away members.)

What are the strengths of Fraternity? In which areas do the council and/or fraternity see the need for change/growth? What spiritual change/growth has occurred in the past three years?

❖ **Franciscan Youth/Young Adults: (Regional Contact - Regional Minister)**

Does your fraternity sponsor any Franciscan Youth or Young Adult Groups?

Does your fraternity have any special events or ministries where youth and/or young adults participate? Please explain.

❖ **Health and Development Stage of Your Satellites, Re-activating Fraternities, Newly Forming &/or Emerging Communities**

Please describe each community, your level of mutual participation (*How often do you visit each other or share mutual events?*), your level of assistance (especially in formation), and your evaluation of their health, spirituality, and viability!

Satellites:

Re-activating fraternities:

Newly forming: *(See Chapter 6 Regional Guidelines)*

Emerging: *(See Chapter 7 of Regional Guidelines, esp need for visitation & Altius)*

Greater View: Relationship with Region

❖ **Communications and Ecumenism (Regional contact - Councilor for Communications)**

Communications (Councilor for Communications or your REC Liaison)

1. Do you know the regional liaison for your fraternity?
2. Do you receive regular contact from the region?
3. Are your contacts helpful? Explain.
4. Does the region provide you with requested support? Explain.
5. Describe your satisfaction with current levels of regional communications, emails, etc.

Does your Formation Director have contact with a Regional Formation Director?
How often?

Are these contacts worthwhile?

Is there an event or happening in your Fraternity that you would like mentioned in the Region's Annual Report to NAFRA?

Do you have any events or recognitions that should be sent to the local diocesan papers?

How may the Regional Executive Council be of greater service to you?

❖ **Ecumenical Actions (Councilor for Communications and Ecumenical Action)**

Please advise us of any ecumenical and interfaith actions you have initiated or participated in. Please provide the name and contact information of the person involved in this activity.

❖ **Justice and Peace, Integrity of Creation (Regional Contact - Councilor for JPIC)**

Please describe any actions of the fraternity members in Justice Peace or other activities related to Catholic Social Initiatives (e.g., working for equality, respect for the marginalized, solidarity with the poor, immigration issues, etc.) Please provide the name and contact information of your Fraternity JPIC Animator.

❖ **Integrity of Creation (Regional JPIC Councilor)**

Please describe any fraternity actions in any aspects of environmental protection, renewal, restoration of reclaimed areas, planting new plants/trees, pollution abatement, recycling, etc.

For the Minister and Spiritual Assistant:

Please help us and the National Fraternity better understand the vitality of the Order in your local fraternity.

(This would be a valuable exercise for all council members to write up and include a similar evaluation!)

1. Fraternity Minister's Evaluation (In your view, describe how your fraternity is doing.)

Use separate sheet/sheets as needed

2. Spiritual Assistant's Evaluation (In your view, describe how your fraternity is doing.)

Use separate sheet/sheets as needed

3. Optional Evaluations from Other Council Members.

Use separate sheet/sheets as needed

Instructions: The fraternity Annual Report to Region should be a collaborative effort by all members of the council, contributing remarks from their own areas of expertise and personal observation of both council functioning and quality of fraternal life. It is to build fraternal understanding and mutual support.