

## Annual/Treasurer's Report Instructions

1. **Please include your Fraternity Roster Sheet:** An updated Roster of your Fraternity members including your Spiritual Assistant's contact information if you have one is to be mailed with your Annual Report so the Region can update records. *Please send your Roster sheet even if there are no changes. We need your fraternity member count as of December 31, 2015.*

*Note: The number of members on your Roster is to match those reported on Annual/Treasurer's Report.*

2. **Complete the Annual Report:** Fill out your Fraternity Name and Number, record all changes in membership and answer all questions please.
3. **Complete 2 copies of the Treasurer's Report:** Enter information and sign this report, making sure that the numbers match the information on the Roster Sheet and Annual Report. Two copies of this report are needed as you are to *send one copy of the Treasurer's Report to the Regional Minister with the your Annual Report and the Roster, and the other copy with a check for the Fair Share to the Regional Treasurer.*

Note: The Regional Fair Share Policy is included in the report for your reference.

**Please note:**

**The completed Annual Report (2 pgs), your Roster and a copy of the Treasurer Report (1 pg.) are to be sent to the Divine Mercy Regional Minister:**

**David Seitz, OFS  
Regional Minister, Divine Mercy  
4905 Clintonway Dr.  
Waterford, MI 4832**

**Fair Share payment and a copy of the Treasurer Report (1 pg) are to be sent to the Divine Mercy Regional Treasurer:**

**Fran Walker, OFS  
Regional Treasurer, Divine Mercy  
3136 Rickman Ave NE  
Grand Rapids, MI 49505**

**The Treasurer's Report & Fair Share payment  
are due to the Regional Treasurer by March 15, 2016.**

**The Annual Report is due to the Regional Minister by March 01, 2016.**

## Divine Mercy Regional Fraternity Annual Report

*Note: Mail a copy to the Regional Minister and retain a copy for your files.*

Fraternity Number #56-\_\_\_\_\_ Fraternity Name\_\_\_\_\_

### Please List Below Deceased Members of Your Fraternity in 2015:

	/ /	/ /	/ /	/ /	/ /
Last Name	First Name	Date of Reception	Date of Profession	Date of Birth	Date of Death

	/ /	/ /	/ /	/ /	/ /
Last Name	First Name	Date of Reception	Date of Profession	Date of Birth	Date of Death

	/ /	/ /	/ /	/ /	/ /
Last Name	First Name	Date of Reception	Date of Profession	Date of Birth	Date of Death

	/ /	/ /	/ /	/ /	/ /
Last Name	First Name	Date of Reception	Date of Profession	Date of Birth	Date of Death

	/ /	/ /	/ /	/ /	/ /
Last Name	First Name	Date of Reception	Date of Profession	Date of Birth	Date of Death

### Please List Below People Who Professed or Transferred into Your Fraternity in 2015:

Last Name	First Name	Address	City /State	Zip +4	Phone: Area Code + Number
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/ /	/ /		/ /		
Date Received	Date Professed	Church Where Professed and Transferred from Fraternity # & Location	Date of Transfer		

Last Name	First Name	Address	City /State	Zip +4	Phone: Area Code + Number
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/ /	/ /		/ /		
Date Received	Date Professed	Church Where Professed and Transferred from Fraternity # & Location	Date of Transfer		

Last Name	First Name	Address	City /State	Zip +4	Phone: Area Code + Number
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/ /	/ /		/ /		
Date Received	Date Professed	Church Where Professed and Transferred from Fraternity # & Location	Date of Transfer		

**Demographics:** Please enter the number of members in your Fraternity below:

Active/Inactive Professed:\_\_\_\_\_ Candidates:\_\_\_\_\_ Inquirers:\_\_\_\_\_ Orientation:\_\_\_\_\_

Spiritual Assistant Name: \_\_\_\_\_

**Enter the last dates of the following below as noted in your Fraternity Register:**

Last election:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Fraternal Visitation:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Pastoral Visitation:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Note any Council Member changes below, *not due to an election* and give the reason for the change:

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How does your Fraternity stay in contact with / take care of “isolated members”? (CIOFS describes “isolated” as inclusive of the homebound, those in nursing/assisted living facilities, inactive and far away members.)

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**Greater View:**

What is the Fraternity’s level of participation in Regional gatherings? Has participation improved in 2015?

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If your Fraternity is not participating, what prohibits members from attending?

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Are all professed members *and candidates* receiving the TAU-USA either electronically or in mail? \_\_\_\_\_

**Person responsible for distributing Regional Newsletter to Fraternity either electronically or hard copy:**

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone \_\_\_\_\_ E-mail Address \_\_\_\_\_

Is there an event or happening in your fraternity that you would like mentioned in the Divine Mercy Regional Annual Report submitted to NAFRA?

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How may the Divine Mercy Regional Executive Council be of greater service to your Fraternity?

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## Divine Mercy Regional Fraternity Treasurer's Report 2015

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*Mail a copy to the Regional Minister and a copy to the Regional Treasurer; retain a copy for your file.*

Fraternity Name \_\_\_\_\_ #56- \_\_\_\_\_

Treasurer's Name \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Your fraternity is expected to contribute **\$42.00** a year from your Common Fund for each **Active Member**. The National Fraternity receives **\$17.00** of this money and from that amount a Fair Share Contribution is sent to the International Fraternity. An 'Active Member' is:

1. Any **professed** member who either:
  - A. Participates by attending fraternity meetings and by providing financial support to the community;
  - or B. Has been excused by the Fraternity Council from one or both of these obligations.
2. A **candidate** in formation.

ADD: # of 'Participating' Members \_\_\_\_\_  
# of 'Excused/Dispensed' \_\_\_\_\_  
# of Candidates \_\_\_\_\_  
= **Total Active Professed** \_\_\_\_\_ x \$42.00 = **Total Fair Share Due** \$ \_\_\_\_\_

(Fair Share is paid for **all professed members (participating and excused) & candidates in formation as of December 31, 2015**. *Please make sure numbers on this report match your annual report and your roster.*)

While it is preferred fraternities make one annual contribution, some fraternities may need to divide their fair share payments. If you need to do this, please contact Regional Treasurer to make arrangements.

Please make check payable to Divine Mercy Regional Fraternity SFO and mail check with this report to:  
Divine Mercy Regional Treasurer Fran Walker, OFS, 3136 Rickman Ave NE, Grand Rapids, MI 49505

**Total Fair Share Due** \$ \_\_\_\_\_ **Signed** \_\_\_\_\_ **Date** \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Fraternity Treasurer

### Fair Share Policy

The **National Statutes** designate who is to be included in paying Fair Share, and who is responsible for the contribution. "The **Local Fraternity is responsible** for contributing to the Regional Fraternity on a fair share basis **from its common fund** to underwrite the costs of that fraternity [cf. General Constitutions, article #30.3]." Note that payment of the Fair Share is the specific responsibility of the fraternity, *not* the individual member, and comes out of the fraternity's Common Fund. Again, the **National Statutes notes**: "**A Fair Share contribution is made based on the number of active and excused brothers and sisters, but not** for those who are deemed **lapsed**. The **Statutes** define the terms "**active**" and "**lapsed**." Note that here the "**active**" category *includes* those whom the fraternity has "**excused**."

- a. An **active** fraternity member is **one who participates** both by attending fraternity meetings and by providing financial support to the community, **or whom the fraternity has excused** from such obligations.
- b. Those brothers and sisters who neither attend meetings, support the community financially, nor have valid reasons due to health, family, work or distance, and who, after personal invitations to return to fraternity, consciously and deliberately reject or ignore the invitation, will be termed "**lapsed**" and will not be carried on the fraternity membership roll nor be reported as a member to higher fraternity Councils."

Thus, **for the purposes of Fair Share, there are only two categories of fraternity members, "active" or "lapsed."** *Those whom the fraternity has excused for valid reasons from attending fraternity meetings and/or contributing to the Common Fund belong in the 'active' category, and the fraternity should pay Fair Share for them.*

If you have questions about how the policy should be applied in your fraternity, please feel free to contact the Regional Minister, David Seitz, OFS (248) 425-8534 [dmrofsdavid@gmail.com](mailto:dmrofsdavid@gmail.com).