

Administrative Tips

I. OCDS Central Office Submittals

1. Membership Roster

Sec. XIV: Registers (cf. Const. #54)

1. It is essential to keep records for various reasons, but most importantly to maintain a history of the Community and member data. A Community register is required for elections, Council meetings and visitations. At a minimum, the register must contain a membership roster, a record of elections, admissions, promises, vows, dismissals, deaths and transfers. This information must be kept as a common document that can easily be reviewed. An updated copy of the membership roster, to include contact information, names in Carmel, and the date of the most recent ceremony, shall be submitted to the Central Office annually.

2. Dues/ Financial Report

Sec. XXII: Finances (cf. Const. #55)

1. The Provincial Delegate has the help of a Central Office in carrying out his duties. This office is funded and supported by an annual contribution of the membership of the Province. The Central Office, in turn, provides a portion of its funding for the General Delegate's office in Rome.
2. The OCDS Provincial Council will determine the amount of the annual donation from the members to the Central Office for its support. The Community will submit this annual donation during the month of February, along with the financial report required by Constitution #55.
3. Members contribute according to their means to the financial needs of the Secular Order.

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II. Membership Roster

1. Roster: "Year1-Year2" Worksheet/Tab (Excel Template from <http://www.ocds.info>)

	A	B	C	D	E	F	G	H	I	J
1		Last, First + (Carmelite Name)	Address	City, State Zip	Hm Phone + Cell	Email	AD	TP	DP	VOWS
2	1									
3	2									
4	3									
5	4									
6	5									
7	6									
8	7									
9	8									
10		Extended Members					AD	TP	DP	VOWS
11	i									
12	ii									
13	iii									
14		Spiritual Assistant								
15										
16										
17		Highlight all changes made!								
18										
19										

changes done **year1-year2**

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1. Roster lists Active, Extended Members and Spiritual Assistants Only
 2. Aspirants –not required, only admitted members are tracked in the master register. You may track internally for your own records.
 3. Provide Admission, Temporary Profession, Definitive Promise, Vows dates.
 4. Tracking Roster Changes
 5. Inactive Members – are removed from the register’s active list
2. Roster – “Changes Done” Worksheet/Tab (Excel Template from <http://www.ocds.info>)

Sample Roster Changes:

	A	B	C
1	Name	Type of change made	Date Change was made
2	Guy, Sandra	Withdrew from community for health reasons	7/3/2003
3	Jackson, Jen	Became an extended member	1/1/2007
4	Yu, Lee	Change of Address	4/1/2010
5	Joy, Leddy	Change in Phone #	5/2/2011
6	August, Abe	Transfer into our community from	8/8/2011
7			
8			
9			
10			
11		Instructions	
12		Use this worksheet to document what are the changes made to the spreadsheet.	
13		This makes work easier for Central Office.	
14		Thank you!	
15			
16			

Ready | **changes done** | year1-year2 | 100%

Administrative Tips

3. Supporting Form Documents

1. Application and Permanent Record Form A – To be filled out by candidate wishing to be admitted, signed by council member upon council approval (usually signed by president or formation director) and also signed by the Spiritual Assistant (priest). Make copies for your records.
2. Ceremonies Form B – To report all ceremonies, signed by Spiritual Assistant or priest delegated to perform ceremonies.
3. Change of Record Form C – To report to Central Office any change in address, name, etc.
4. Deceased Member Record Form D – To report the death of a member.
5. Transfer Application Form – To report transfers from one community to another.
6. Vows Form – After the approval of Council, and after a year of discernment, the vows form is filled out and signed by the president/group leader then submitted to Fr. Donald Kinney, OCD, Provincial Delegate to sign.
7. Delegation of Faculties Form – To request a priest other than the appointed Spiritual Assistant to perform ceremonies, signed by Fr. Donald Kinney, OCD, Provincial Delegate.
8. Community/Group Newly Elected Councils - used for OCDS Directory – See sample

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4. Roster and Form Submittals – How you can help:

- Include a copy of the updated roster, if possible, when submitting Forms A, B, C, D, Vows to the Central Office. This will make it easier to reconcile incoming records with the master register.
- Use the latest version of Form A (version 7/08 from <http://www.ocds.info>).
- Member information on forms should match member information on roster. The following issues are prevalent across the board:
 1. The names on the forms at times don't match the names on the roster or Form A. Non-matching names add challenges to the updates of the master register. If using a nickname, please also indicate that on Form A and on the membership roster submittals for cross-reference.
 2. Incorrect spelling of names.
 3. Incorrect City.
 4. Non-matching address, e.g. address on roster submittal not matching address on Form B.
- Send Form A (original) – Form A's not being submitted for newly admitted members
- Clearly identify phone numbers e.g. home (h), cell (c) or work phone (w)
- Email a copy of the roster if roster is in electronic format

Administrative Tips

III. Dues/Financial Report Submittal

1. \$25 Annual Dues

- i. Not necessary to submit list of people who paid dues. The Central Office does not require this information. You may track it if you wish within your group or community.
- ii. Checks made out to “OCDS Central Office”
- iii. Write in “Dues” on Check Memo – Checks are sometimes sent to the Central Office without any indication of what they are for.
- iv. Sec. XXII: Finances (cf. Const. #55)

2. ...The community will submit this annual donation during the month of February, along with the financial report required by Constitution #55.

2. Financial Report

- i. Sec. XXII: Finances (cf. Const. #55)

7. The duties of the treasurer are specified in Constitution #55. The annual financial report to the Provincial Delegate shall be submitted not later than February.