**Suggested Records and Resources to be Accessible

Computer access of standard documents acceptable.

Consider ORGANIZED WELL-MAINTAINED binders OR FILES as "gifts of love" to be given to your brothers and sisters at the NEXT Chapter of Elections!

***All	<u>Fraternity</u>	Council	<u>Members</u>

Esser	ntial Documents of the Secular Franciscan Order
• _	The Rule of the Secular Franciscan Order
• _	General Constitutions of the SFO
• _	Statutes of the National Fraternity of the SFO in the USA
• _	Ritual of the Secular Franciscan
• _	Statutes of the International Fraternity of the SFO
• _	Statutes for Spiritual and Pastoral Assistance to the SFO
<u>Othe</u>	r Documents
• _	Statement of Purposes, Fraternity Internal Controls and Treasury Guidelines (nafra
	website)
• _	The Four Pillars (BSSF Document)
	BSSF Regional Guidelines (rev 2012)
• _	BSSF Vision Statement and History
	***In addition to the above the following should be maintained by:
<u>Minis</u>	ter/Leader
_	Fraternity Register/Ledger (Franciscan Resources) [most important document]
	Formation Documents, Programs, Manual
_	BSSF Regional Formators' Guidelines for Orientation and Initial Formation (6/30/10)
	BSSF Formation Manual (cd - updated 8/06)
	Handbook for Spiritual Assistance to the Secular Franciscan Order
	Handbook for Secular Franciscan Servant Leadership
	For Up To Now (FUN) Manual
Frate	<u>ernity</u>
	Document of Canonical Establishment (preserve in an acid free, archivist covering)
	Minutes of Council and Fraternity Gatherings
	Agendas
	Treasurer's Reports and Information

	_Budgets
	Membership Rosters
	Local Correspondence
	Annual Fraternity Reports
	Chapter of Elections Documents
	_Council decisions and correspondence on professed membership to include: Excused,
	lapsed, dismissed, resigned from fraternity, resigned from Order, transferred.
Dogion	
Region	BSSF Roster (updated periodically)
	Regional Correspondence
	Budgets
	Pre-Visitation Letters
	Fraternal and Pastoral Pre-Visitation Questionnaires
	Fraternal and Pastoral Visitation Reports
	Rubrics for the Communal Celebration of the Liturgy of the Hours (Document)
	Franciscan Wake Service (Program)
Vice M	inister/Leader
VICE M	(Should periodically review Secretary and Treasurer's records)
Secret	ar <u>y</u>
	Fraternity
	Minutes of Council and Fraternity Gatherings
	Attendance records
	Agendas
	Correspondence
	Local Correspondence
	Council decisions and correspondence on professed membership to include: Excused,
	lapsed, dismissed, resigned from fraternity, resigned from Order, transferred.
	Membership Rosters
	Regional Correspondence

Treasurer

	Fraternity Finances
	Treasurer's Monthly/Quarterly Financial Reports
	Treasurer's Annual Financial Reports
	Annual Fraternity Budgets
	Annual Regional Budgets
	Copy of review of Financials (conducted every 3 years)
	Copy Bank Statements
	Treasurer's Ledger:
	Recording of contributions received in accordance with Treasury Guidelines
	Receipts and reimbursements requests
<u>Format</u>	<u>tion Director</u>
Format	ion Documents, Programs, Manual
	BSSF Regional Formators' Guidelines for Orientation and Initial Formation (6/30/10)
	BSSF Formation Manual (cd - updated 8/06)
	FUN Manual (after 2012 formation workshop)
Format	ion Records
	List of On-going Formation topics and assignments
	Attendance List of Members in initial Formation
	Log of member formation (see formators' guidelines)
Other I	Notes:

	story of Fraternity (suggestions for maintaining a scrapbook/record of the fraternity
	Phase I: Newly Forming Group
	Date
	City and state
	Selection of name
	Leader
	Spiritual Assistant (if applicable)
	Formation director (appointed)
	Members
	Sponsoring fraternity and minister(s)
	Region - applicable if newly forming group since establishment on October 24, 1994
	Province of original bonding
	Fraternal and Pastoral Visitation (visitors and date)
	Other
	Phase II: Emerging Community
	Date
	Council chosen
	Fraternal and Pastoral Visitation (visitors and date)
	Other
	Phase III: Canonical Establishment
	Date
	Ceremony
	Other
	First Chapter of Elections
	Date (after canonical establishment)
	Newly elected council
	Other
	Special events, newsletter articles, pictures. Include description and dates.(may be in
file)	
er N	otes:

Revised: June 20, 2012, Check List added September, 2022, Approved November 6, 2022