

## OCDS COMMUNITY DUES

Community dues are the primary source of funds for each community, to pay for the PC assessment and fees, stipends for friars and other speakers, charitable contributions, and other incidental costs required to properly function as a community.

Members start paying dues when they enter Formation I. A member's inability to pay dues, temporarily or indefinitely, is a matter to be handled by the local council with discretion and sensitivity. [See Statutes Sec. XIV.2]

### Reason for dues

#### Examples:

- Rent for your meeting room (even if you meet at the local Carmelite monastery or the local parish, you should be paying rent for the use of the room).
- Stipend for any talks that an outside speaker might present at a meeting.
- Purchasing scapulars, copies of the Gospels and the OCDS Constitutions for members being admitted to Formation I.
- Community mail and copies.
- Visitation expenses.
- Sending representatives to the triennial Plenary Council Meeting [Statutes Sec. XXII] and Provincial workshops.
- Helping the poor and/or helping support the nuns and friars of the Order. [Constitutions Art. 55 & Statutes Sec XIV.3]
- Spiritual assistant stipend (if the spiritual assistant is a community member and not provided a stipend, you could offer a stipend for any talks given to community).
- Various other expenses approved by the local Council and community.
- Communities will also have regular expenses such as the annual Provincial Assessment (provincial dues) and the annual retreat. These funds can be collected as a part of community dues or may be assessed separately.

## Provincial annual assessment

The Province's Annual Community Assessment (provincial dues) helps cover the expenses of the Central Office, Provincial Delegate, and Provincial Council.

A portion of these funds shall also be forwarded by the Central Office to the General Secretariat of the Secular Discalced Carmelite Order to support its functioning. A portion may be sent to the Carmelite Institute of North America or a similar organization for Carmelite studies. [Statutes Sec. XIV.5]

## Structure of the Provincial assessment

The assessment for each community is made according to the number of its members, although it does not apply to Aspirants, or members on Leave of Absence.

## Waiver consideration for a member's dues

The local Council may request to be relieved of the assessment for members who are incapacitated such as infirmed members who do not attend meetings or not in regular contact with the community. If a member has dropped all contact with the community, the local council may remove the member from the community roster and be relieved of the assessment for that individual. The member's permanent record is to be updated accordingly, and a copy sent to the Central Office. [Statutes Sec. XIV.5]

## Reporting of expenses at local and Provincial level

The community treasurer is to present the status of community funds to the local Council every six months (and as requested), and to the community and the Province/Central Office in a written report every year. It is suggested that the easiest thing would be to provide everyone in the community with a copy of the financial report that is submitted annually to the Province/Central Office. [Constitutions Art. 55, Statutes XIV, 4]

An annual financial report from the Province / Central Office showing how the Provincial Dues are spent will be published in the *Flos Carmeli*. [Statutes Sec. XXII.10] "The Provincial Council shall submit an annual financial report to the local communities of the Province.

## Clarifying expenses on the community financial report

It is appropriate for a member of the community to question what the community dues are going towards. The reason for the annual financial statement being provided to the community is to provide some accountability to the community for how the dues are being spent. The written report provides much more information than the periodic verbal treasurer's report that is part of the community's business meeting. Unfortunately, the Provincial Council has previously come across a couple of communities where funds were spent improperly and without approval from the local Council or community. We very much want to think that we can trust our fellow community members, but the reality is that money is one of those touchy things which are not always handled appropriately.

## Local council discernment of community dues

Most communities have dues of about \$10/month which can be paid monthly, quarterly, or in full annually. Some communities pay provincial dues out of those regular dues and others collect the provincial dues separately. It does help if the council draws up a budget each year which is shared and discussed with the community and then the amount of dues can be set based on the expected budget.

The vast majority of members can afford \$10/month as part of their monthly budget. For the small number of people who live on limited incomes, Statutes Sec. XIV.2 notes that the local council should handle this with discretion. In other words, the member should approach a member of the local Council to explain privately why they are unable to pay the dues. This gets shared with the other members of the local Council, which informs the treasurer that this individual is excused from dues. Both the Council and the treasurer should keep this information confidential. Some members are better off financially and are encouraged to contribute extra to help those few members unable to afford dues or other significant expenses such as the annual retreat.

## Community bank accounts

See the separate Provincial Policy on OCDS Community Bank Accounts.