

UNION OF SAINTS

Incident • Interaction • Operations Report

(Ministerial & Legal Advocate Use)

SECTION I — REPORT IDENTIFICATION

Report Type (check all that apply):

- ☐ Incident
- ☐ Interaction
- ☐ Operation
- ☐ Financial Documentation
- ☐ Positive Interaction / Accolade
- ☐ Journal Entry
- ☐ Other: _____

Report Number (if applicable): _____

Date of Report Completion: _____

Prepared By (Name & Role):

Affiliation / Ministry / Program:

SECTION II — DATE & TIME DETAILS

Date of Incident / Interaction / Operation: _____

Time (Start): _____ ☐ AM ☐ PM

Time (End): _____ ☐ AM ☐ PM

Time Zone (if relevant): _____

SECTION III — LOCATION & CONTEXT

Location (physical or virtual):

Setting / Context (public space, meeting, correspondence, financial activity, outreach, etc.):

SECTION IV — PARTIES INVOLVED

Primary Individual(s) Involved:

Name(s): _____

Role / Relationship (if applicable): _____

Witnesses (if any):

(If none, write “None observed.”)

SECTION V — INCIDENT / OPERATION / INTERACTION DESCRIPTION

(Narrative Section — use full sentences; attach addendum if needed)

Detailed Description (facts, sequence, and observable behavior):

☐ **Addendum Attached** (additional pages, statements, documents)

SECTION VI — RESPONSE / EFFORT / REMEDY / GIFT / CAUSE

Actions Taken or Offered:

(Include responses, de-escalation efforts, financial actions, remedies, gifts, or causes addressed)

Immediate Outcome (if any):

SECTION VII — STEP PROCESS REFLECTION

(Ministerial & Advocate Framework)

1. EXPERIENCE

(What occurred and how it was experienced)

2. RESPONSE

(How the situation was addressed or managed)

3. REFLECTION

(Lessons, insights, or considerations moving forward)

SECTION VIII — FINANCIAL OR RESOURCE NOTES (IF APPLICABLE)

Funds, Resources, or Assets Involved:

Amount / Value: _____

Purpose / Justification:

☐ Receipts or documentation attached

SECTION IX — POSITIVE ACCOLADES / AFFIRMATIONS (OPTIONAL)

Recognition of Positive Conduct, Service, or Integrity:

SECTION X — FOLLOW-UP & RECOMMENDATIONS

Recommended Next Steps (if any):

Review Date (if applicable): _____

SECTION XI — DECLARATION

I affirm that this report is a truthful, respectful, and accurate account prepared in good faith for ministerial, legal, or organizational purposes.

Signature: _____

Date: _____

OPTIONAL NOTES

- This form may be used **preventively, reflectively, or for formal record-keeping**
 - Language should remain factual, non-speculative, and respectful
 - Additional pages may be attached without limitation
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