



# Minute Book

of

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## Conference

*Society of St. Vincent de Paul*

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*City, State*

Date of Opening Entry \_\_\_\_\_

Date of Closing Entry \_\_\_\_\_

## Dedication

This book includes sample formats for recording the minutes and records of the Conference for Conferences that have not yet moved to electronic records. We recommend that you make additional photocopies of forms before using them.

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Society of St. Vincent de Paul**

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# Introduction

In 1978, the National Council of the United States, responding to the suggestion that had been voiced by many Conferences, asked its National Secretary to prepare a simplified format for recording the Minutes of Conference meetings. The National Secretary subsequently reported his findings and recommendations, and these were approved by the National Council.

This book has been revised several times since then, but at the same time, most Conferences have begun to record and report about their works, finances, and membership by electronic means. Indeed, the reporting to the National Council is now conducted via the National Member Database, through which Conferences store Member and Officer information, and submit their Annual Reports.

**<https://www.svdpmembers.com/>**

The enclosed worksheets are not as practical anymore, this document will likely be discontinued in the near future, and replaced by a Secretary's Handbook.

The Secretary's work remains essential! Carefully kept records promote the functioning of the Society. They provide the basis for accurate reports; contain material for evaluating the spirit and works of the Conference; describe projects and undertakings that can be usefully shared with other units of the Society.

Whether recording in a database or a notebook, the able and conscientious secretary makes an essential contribution to the daily operations and development of the Conference.

The Society of St. Vincent de Paul thanks you for this great service.

# Duties of Conference Officers

## **Secretary**

There may be more than one Secretary. The Secretary shall attend meetings of the Conference, and ensure that all votes are recorded and minutes kept of all proceedings. The Secretary shall give or cause to be given notice of all meetings of the Conference and shall perform such other duties as may be prescribed by the President.

The Secretary is responsible for ensuring that records are kept of Aggregation, formal documents, meeting attendance and that annual report records are maintained.

The preparation of the Conference Annual Report is considered to be a three-person job. The Secretary prepares all of the statistical information. The Treasurer provides all of the financials. The President verifies the report and signs it, acknowledging it is complete and accurate.

## **President**

Role and responsibilities of President: The President attends to the progress of the Conference. The President supports the Conference members in their Vincentian action, helping and assisting them, as circumstances require.

The President ensures that links and communication are effectively maintained between the Conference and the Council to which it is attached (for Isolated Conference as assigned by the Region). The President attends and represents the Conference at District Council meetings. The President develops working relationships with neighboring Conferences, the Parish, and with agencies and governmental welfare organizations within the Conference's responsibilities.

The President shall, in general, supervise all affairs of the Conference. The President shall preside at all meetings of the Conference and shall be an ex-officio member of all committees.

The President shall have responsibility for governance of the Conference and shall see that all orders and resolutions of the Conference are carried into effect. If the District or (Arch)Diocesan Council does not report to government agencies, the Conference President is responsible for submitting any required reports to said agencies, e.g., Internal Revenue Service or a State agency.

The President will advise the Conference of the requisite financial support that is to be provided to higher Council(s) and the Region annually. If the President were unable to attend and preside at any meeting of the Conference this privilege and duty may be delegated to the Vice President or any Officer.

## **Vice President(s)**

Role and responsibilities of Vice President(s): There must be at least one Vice President. In the event multiple Vice Presidents are appointed one must be designated as the First Vice President. The First Vice President shall perform the duties of the President in the event of the President's temporary absence and shall have such other duties as the President or Conference may assign. All Vice President(s) collaborate with the President in all matters affecting the Conference. The Vice President(s) shall attend the Conference meetings.

## **Treasurer**

Role and responsibilities of Treasurer: The Treasurer shall be responsible for the Conference funds and securities and maintenance of full and accurate accounts of receipts and disbursements in books (official records) belonging to the Conference and the deposit of all monies and other valuable effects in the name and to the credit of the Conference in such depositories as may be designated and approved by the Conference.

The Treasurer shall attend meetings of the Conference. The Treasurer informs members of the Conference's financial position by submitting a written statement at every meeting, and prepares a budget for the Conference, which shall be approved annually.

The Treasurer shall assure the disbursement of funds of the Conference as may be ordered by the Conference taking proper vouchers for such disbursements, and shall assure an account of all transactions, supported by the appropriate documentation and that the financial condition of the Conference is rendered to the President and Conference at the regular meetings, or whenever they may require it.

If required by the Conference, the Treasurer shall give the Conference a bond in such sum and with such surety or sureties as shall be satisfactory to the Conference for the faithful performance of the duties of the office and for the restoration to the Conference, in case of death, resignation, retirement or removal from office, of all books, papers, vouchers, money and other property of whatever kind in the Treasurer's possession or under the Treasurer's control belonging to the Conference.

# General Records of the Conference

The following pages contain forms that may be used to record Membership, assistance to neighbors, and other historical records of the Conference.

Many Conferences today keep these records in an electronic format, either on a single computer, or in an online database designed for this purpose. The preferred format for submission of Annual Reports is also electronic. Whether records are kept on paper or digitally, it is a best practice to have at least one backup copy, and to keep all copies secure to ensure confidentiality of all the information.

All Conference roster information, including Ozanam Orientation, as well as the names and terms of Conference Officers and Spiritual Advisors, is required to be entered into the National Membership Database. Because the Secretary is responsible for maintaining the information, the Secretary is typically assigned also as the database administrator. The database can be found here:

**<https://www.svdpmembers.com/>**

# Conference Identity

Every Conference's identity includes its Councils and Region. Members should know the names of those Councils and participate in their activities, such as assemblies and retreats.

Conference Name \_\_\_\_\_

Founding Date \_\_\_\_\_

Aggregation Date \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

Helpline Number \_\_\_\_\_

Web Site \_\_\_\_\_

Email \_\_\_\_\_

District Council Name \_\_\_\_\_

(Arch)diocesan Council Name \_\_\_\_\_

Region Name \_\_\_\_\_

National Council of the United States

International Council General

# Servant Leadership of the Conference

On this page, record the names and contact information for the Servant Leaders of your Conference. Be sure to note whether this is the President's first or second term. If it is the second, your Conference must elect a new President by the end of the current term.

<b>President</b>	Name		Date Elected
			Term: 1 2
Address		Telephone	Email
<b>Vice President</b>	Name		Date Appointed
Address		Telephone	Email
<b>Vice President</b>	Name		Date Appointed
Address		Telephone	Email
<b>Secretary</b>	Name		Date Appointed
Address		Telephone	Email
<b>Treasurer</b>	Name		Date Appointed
Address		Telephone	Email
<b>Spiritual Advisor</b>	Name		Date Appointed
Address		Telephone	Email
<b>Other</b>	Name		Date Appointed
Address		Telephone	Email

# Membership Records

In brief:

**Active Members** are those who participate regularly in the prayer life, meetings, and charitable activities through personal contact with the poor of the Vincentian Conference or Council into which they have been received.

An Active Member accepts the Rule and Statutes of the Society, belongs to the Catholic Church, and is received as a Vincentian brother or sister into the Society's Conference or Council with which he or she is affiliated... Only Active (Full) Members hold office in the organization.

**Associate Members** ... include those who sincerely and publicly accept the Society's Rule but may or may not belong to the Catholic Church and may or may not attend Conference meetings or engage in the works of the Society on a regular basis. ...They are invited to attend the general meetings and special observances of the Society and to participate in its charitable activities.

*(Excerpted from The Rule, Part III, Statute 3)*

It is very important to maintain accurate records of all Active and Associate Members of the Conference. In addition to basic contact information, the Secretary should maintain a record of the date that Members joined, and whether they have completed Ozanam Orientation, which is required for all Members within one year of joining, as well as the locally required safety training and clearance, such as "Safe Environment."

If Members have not completed these, be sure to let them how to do so and ensure that it is completed.

Member attendance records may be useful for your President, Spiritual Advisor, or Membership Committee to reach out to those who have not attended a meeting recently to encourage them to return, or to discuss challenges they may be facing.

To record attendance using this sheet, simply make marks in each month indicating whether or not the Member attended each meeting:

Member Attendance Record				
Name	OCT	NOV	DEC	JA
1 <i>John Smith</i>		x		
2				

# Roster of Active Members of the Conference

Name	Address	Phone	Email	Date Joined	Ozanam Orientation Y/N	Safety Cleared Y/N
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

## Roster of Active Members of the Conference (continued)

Name	Address	Phone	Email	Date Joined	Ozanam Orientation Y/N	Safety Cleared Y/N
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						

# Roster of Associate Members of the Conference

Name	Address	Phone	Email	Date Joined	Ozanam Orientation Y/N	Safety Cleared Y/N
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

## Roster of Associate Members of the Conference (continued)

Name	Address	Phone	Email	Date Joined	Ozanam Orientation Y/N	Safety Cleared Y/N
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						

# Member Attendance Record

Name	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												

<b>Name</b>	<b>OCT</b>	<b>NOV</b>	<b>DEC</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>JUN</b>	<b>JUL</b>	<b>AUG</b>	<b>SEP</b>
19												
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34												
35												
36												

# Weekly Minutes and Records

The Secretary's most visible work within the Conference is keeping the minutes at every meeting, which includes keeping attendance records.

The Minute Sheet follows the typical Conference Meeting Agenda outlined in the Rule, Statute 7. It is important to note that not every meeting will necessarily include every element of this agenda. For example, the Committees may simply have nothing to report.

Minutes also are an important legal record of the decisions of the Conference. As such, it is not necessary to try to record the discussions that led to the decisions, only the decisions themselves. These may be decisions related to assistance requests, adoption of bylaws, or election of a president.

In the case of the election of a President, a vote is required. In case of adopting new Bylaws, a 2/3 vote is required, and this total should be noted specifically, e.g. "*The Conference, by a 2/3 vote of Active members, approved the new Bylaws dated....*"

In all other cases, the Rule (Part I, 3.10) reminds us that "*All decisions are made by consensus after the necessary prayer, reflection and consultation. The democratic spirit is fundamental at all levels of the Society and, when appropriate, matters are put to a vote.*"

It should therefore always be noted when a decision was made by a vote, rather than by consensus.

The Weekly Worksheet may be used to record assistance to neighbors each week, and to categorize assistance using the categories included in the Conference Annual Report. By maintaining these records regularly, the cumulative totals will be much easier to determine and report each October. *Please note:* the Annual Report is periodically updated. You should always check for the latest version on the National Council web site, rather than relying on the copy included in this document!

# Meeting Minutes

Meeting of \_\_\_\_\_ Conference on (Date) \_\_\_\_\_

The meeting was called to order by \_\_\_\_\_ at \_\_\_\_\_ AM / PM, followed by the Opening Prayer.

The following members were in attendance:

The following guests were in attendance:

A Spiritual Reflection was led by \_\_\_\_\_, using readings from:

- Vincentian Reflections
- Vincentian Contemplations
- The Rule
- Serving in Hope, Module \_\_\_\_
- Vincentian Meditations
- Other

The Minutes of the previous meeting were approved, with the following amendments (if any):

Home visitation reports:

President's report:

Secretary's report:

Treasurer's report:

Other reports, if any (Committees, Membership, Special Works):

Old business:

New business:

The Conference meets next at:

- Regular Meeting
  - Festival Meeting
  - Conference Liturgy
- Date: \_\_\_\_\_  
Time: \_\_\_\_\_  
Location: \_\_\_\_\_

A Secret Collection was taken up, totaling \$ \_\_\_\_\_. Following the Closing Prayer, the meeting was adjourned at \_\_\_\_\_ AM/PM.

Respectfully submitted by, \_\_\_\_\_, Secretary



## Other Records of the Conference

As previously discussed, most Conferences maintain records electronically, including records pertaining to home visits and assistance to the neighbor.

The Annual Index may be used to create a cumulative statistical record of assistance the Conference has offered in the course of a year. You can make copies for additional pages.

The “Case Record” form is an example you may use, but please note that there is no requirement to collect all of the information on this form. Indeed, it would be very uncommon to do so on a single home visit, but it is up to Conferences to set their own guidelines for this. In doing so, it is important to keep in mind that *“people tend to share personal information more freely with their Vincentian visitors in the relaxed atmosphere of their own homes, Society members should be careful to record only what is essential to serve them.”* (Manual, p.24)

In all cases, the information we record is to be kept in the very strictest confidentiality, and shared only in limited circumstances, only when it is necessary in order to provide assistance, and only with the knowledge and consent of the neighbor.



# Sample Case Record

<b>Confidential Case Record Information</b>						
HEAD OF HOUSEHOLD: LAST NAME		FIRST NAME		Male/Female	Birth Yr	OTHER FAMILY NAME (MAIDEN NAME)
SPOUSE/PARTNER/ROOMMATE: LAST NAME		FIRST NAME		Male/Female	Birth Yr	STATUS: MARRIED UNMARRIED COUPLE WIDOW/WIDOWER SINGLE DESERTED SEPARATED
ADDRESS		APT. /SPACE	CITY	ZIPCODE		TELEPHONE
NAME OF APARTMENT COMPLEX/TRAILER PARK						ETHNIC GROUPS: CAUCASIAN ASIAN BLACK HISPANIC NATIVE AMERICAN PACIFIC ISLANDER
OTHER ADULTS IN RESIDENCE: LAST NAME		FIRST NAME		Male/Female	Birth Yr	INCOME/OTHER AID: SOURCE AMOUNT
CHILDREN: LAST NAME		FIRST NAME		Male/Female	Birth Yr	
HEAD OF HOUSEHOLD OCCUPATION		DRIVER'S LICENSE/STATE ID				FAMILY EXPENSES: TYPE AMOUNT
SPOUSE/PARTNER/ROOMMATE OCCUPATION		DRIVER'S LICENSE/STATE ID				
INTERVIEWER'S SPECIAL COMMENTS:						
PROGRESS REPORT: LIST DATE, INITIALS, AND SERVICES PROVIDED (If more space necessary, continue on back.)						
						RELIGIOUS AFFILIATIONS: 

# Appendix

This appendix contains reference material drawn from other Vincentian publications and placed here for your convenience. Because the original resources may occasionally be updated, be sure to check them for any conflicts. In all cases, the original document, such as the Rule or Manual, take precedence over the excerpts included here.

# Conference Meeting Agenda

## **The Rule, Part III, Statute 7: Conference Meeting Essentials**

A Conference meeting shall incorporate Spirituality, Friendship, Service and our Cultural Beliefs, and could include the following components:

- A punctual call to order
- Roll call
- Opening prayer (which should always include a prayer to the Holy Spirit, the Lord's Prayer, the Hail Mary and a prayer for those whose suffering they wish to share)
- Spiritual reading (or meditation, address) on which members are always invited to comment as a means of sharing their faith
- Approval of Minutes of previous meeting
- Home visitation reports
- President's report
- Secretary's report (including correspondence received, information about the Society or training points)
- Treasurer's report
- A review of one or more parts of the Rule
- Committee reports (including Formation Committee report)
- Membership reports
- Resolutions
- Special Works reports
- Old business
- New business
- Time and place of next meeting (the calendar should include Festival Meetings and Conference Liturgies)
- Secret collection
- Closing prayer
- Adjournment

# Conference Meeting Opening Prayer

**Leader:** In the Name of the Father, etc.

**All:** Amen.

**Leader:** Come, Holy Spirit, live within our lives.

**All:** And strengthen us by Your Love.

**Leader:** Send forth your spirit and new life will be created.

**All:** And the whole face of the earth will be renewed.

**Leader:** Our Father...

**All:** Who art in heaven (etc.)

**Leader:** Let us reflect on the words of Our Lord Jesus Christ, recalling His unity and presence among us: "Where two or three are gathered together in my Name, there am I in the midst of them."  
(*Silence*)

**All:** Lord Jesus, deepen our Vincentian spirit of friendship during this meeting and make us responsive to the Christian calling to seek and find the forgotten, the suffering, or the deprived so that we may bring them your love. Help us to be generous with our time, our possessions, and ourselves in this mission of charity. Perfect in us your love and teach us to share more fully in the Eucharistic Sacrifice offered for all.

**Leader:** Most Sacred Heart of Jesus   **All:** Have mercy on us.

**Leader:** Immaculate Heart of Mary   **All:** Pray for us.

**Leader:** St. Vincent de Paul   **All:** Pray for us.

**Leader:** St. Louise de Marillac   **All:** Pray for us.

**Leader:** Blessed Frederic Ozanam   **All:** Pray for us.

**Leader:** Blessed Rosalie Rendu   **All:** Pray for us.

# Conference Meeting Closing Prayer

**All:** Father, grant that we who are nourished by the Body and Blood of Christ in the Holy Eucharist may realize the depth of our needs, respond more spontaneously to the suffering of others, and come to love You more deeply by service to our neighbor.

Grant us also the wisdom and strength to persevere when disappointed or distressed. May we never claim that the fruitfulness of our apostolate springs from ourselves alone. United in prayer and action, may we become a visible sign of Christ, and may we give witness to His boundless love, which reaches out to all and draws them to love one another in Him.

We thank You, Lord, for the many blessings which we receive from those whom we visit. Help us to love and respect them, to understand their deeper needs, and to share their burdens and joys as true friends in Christ.

**Leader:** That the Cause for the Canonization of Frederic Ozanam, who excelled in the virtue of Christian love, be advanced.

**All:** Lord, hear us.

**Leader:** That our departed friends and relatives, our Vincentian Brothers and Sisters, and those whom we have served, be welcomed into your Kingdom and joined in love.

**All:** Lord, hear us.

**Leader:** In the Name of the Father, etc.

**All:** Amen.

# Act of Consecration to the Sacred Heart

Lord Jesus, Who, seeing the cold indifference of the world and in order to revive charity amongst all people, has unveiled before them Your Sacred Heart and revealed the infinite riches of Your Divine Love, behold us prostrate before You, we who form only one Family, by the bond of fraternal charity, scattered, it is true, throughout the world, but united under the standard of St. Vincent de Paul, and forming only one body and one soul in the common spirit of the apostolate of charity; we dedicate and consecrate to Your Divine Person and to Your Sacred Heart this our Council (or Conference), and all the members who compose it, the poor whom we visit in Your name, the youth and children to whom we respond in order to maintain them in Your service; in a word, all those of whom we have the care, and all the works we have undertaken in various places for Your Glory.

Quite unworthy though we are, we beseech You to receive this offering in the odor of sweetness; inflame us with that fire which from the depths of Your Heart You desire to see burning more and more each day, in order that, filled with the tenderness of Your Heart, we may learn to despise things here below, to love and help our neighbor, by word and example, and that, among the vicissitudes of this world, we may fix our hearts on the riches and happiness that shall never end.

Amen.

*(This act of consecration is to be renewed annually by all units of the Society.)*

# Vincentian Liturgies

## **Special Masses**

*(Excerpted from the Manual, Chapter 2, p. 32)*

Conferences should have a Mass offered on five occasions each year for the following persons and groups:

- The Four Intentions of the Society:  
The Church, the Sovereign Pontiff, the United States of America, the Society
- The Deceased Members of the Conference
- The Deceased Poor
- The Sick and Troubled Who Seek Divine Help and Cure through Ozanam's Intercession
- The Canonization of Frederic Ozanam

## **Vincentian Feast Days**

### **Statute 9: Festival Meetings and Conference Masses**

Conferences and Councils celebrate liturgical ceremonies, particularly Vincentian ceremonies, throughout the year, endeavoring to maintain a spirit of friendship among the members.

The Council of the United States has designated six days for religious observances. On these occasions the members of Conferences and Councils demonstrate the spiritual nature of the Society by attending the Eucharist together:

- Ozanam Sunday (the last Sunday of April)
- The feast day of Blessed Frederic Ozanam (September 9)
- The feast day of St. Vincent de Paul (September 27)
- The Immaculate Conception, Patroness of the Society (December 8)
- A Conference Mass celebrated at least once a year for all members, including spouses and children. During this Mass, it is most appropriate to commission new members into the Conference, pray for those we have visited, pray for our benefactors, pray for the poor, pray for deceased members, and for continued good work.
- Another feast day of local custom, such as December 12, the Feast of Our Lady of Guadalupe.

# Notes on Conference Organization and Activity

## **Introduction to Conferences**

The Conference is the basic unit of the Society of St. Vincent de Paul, and this is where the strength of the Society lies. Conference members value the special “treasure,” the “pearl of great price,” that we have as Society members. (Rule: Part I, Article 3.2) In the United States, the Society of St. Vincent de Paul has two types of membership: Active (Full) and Associate. (Rule: Part III, Statute 3)

The mission of the Conference is the mission of the Society: to join together in a bond of friendship, and to grow spiritually by offering person-to-person service to those who are needy and suffering, in the tradition of our founder, Blessed Frederic Ozanam, and patron, St. Vincent de Paul. For a specific period of time, the Conference chooses qualified members for the various leadership positions. (Rule: Part I, Article 3.11 and Part III, Statutes 11 & 12)

The person-to-person work of most Vincentians is associated with a Conference operating within a Catholic parish, but the Society’s Rule allows for great diversity in the formation of Conferences. They may be established at elementary schools, high schools, and universities, or around particular ministries: to prisoners, residents of nursing homes and shelters, etc. The unifying factor may even be a common professional background or cultural interest.

In the Church today, many people recognize the call of the Gospel of Jesus and the need to serve others. The Society strives to be creative and discover opportunities for meaningful charitable work. It seeks to enlarge the scope of its concern by reaching the hidden and new poor, and to match the skills and interests of all its members with the needs of people. (Rule: Part I, Article 3.5) The Conference provides willing Christian helpers with opportunities to minister to those in need on a person-to-person basis through home visits, and to serve in its special projects or those of the District and (Arch)Diocesan Councils. The Society’s motto is “No work of charity is foreign to the Society.”

The Conference must create awareness for itself in the parish community, finding ways to keep parishioners informed about its charitable works and inviting them to become part of this special ministry. Its President is responsible for maintaining communication with the parish staff, parish council, and other parish social ministry programs.

*Excerpted from: The Manual, Chapter 2, 2.1, p.18*

## **Aggregation of Conferences**

To be membered in the Society of St. Vincent de Paul, a Conference must apply for affiliation and be formally admitted or “aggregated” by the Council General International, located in Paris.

En route to Paris, the application must be approved by the intermediate Councils which link the Conference to the Council General International; approved by the District Council and the Diocesan Council to which the Conference is directly united; then by the National Council; finally, by the Council General International.

Conferences in a diocese having neither District nor Diocesan Councils send their petitions directly to the National Council, headquartered in St. Louis.

After Paris has approved an application for aggregation, the Conference is notified through a reverse chain of command communication: Council General International to National Council to Diocesan Council to District Council to Conference.

Along with the letter affirming the fact of admission, the Council General International provides an appropriately worded Certificate of Aggregation. Many Conferences arrange to have the certificate framed and displayed in the regular meeting place of the Conference.

Just as all Conference must be officially recognized and accepted by the international Vincentian body, all Councils must also be formally united to the worldwide SVdP organization. Councils apply in the same manner and via the same chain of command as do Conferences. The application and approval process results in what is called the “institution” of the Council. Conferences are aggregated; Councils are instituted.

Application forms for “aggregation” and “institution” are obtainable from the National Council Office in St. Louis. All such applications should be submitted in triplicate. One copy is sent to Paris; a second is retained at the National Council Office; and the third is returned to the Conference, after Paris signifies that the unit has been admitted to the Society.

Before applying for aggregation, a Conference should complete a probationary period of one year. The Council General International requires evidence of genuine person-to-person charitable involvement on the part of members and the Conference as a whole. A genuinely functioning Conference is one in which all members should really regard Vincentianism as a vocation.

Constancy in charitable personal service should characterize the life of the Conference and the lives of its members.



**Confédération Internationale de la  
Société de Saint-Vincent de Paul  
Conseil Général**

**LETTRE D'AGRÉGATION**

*Cher(e) Président(e),*

*Nous avons la joie de vous annoncer que, à la suite de la demande présentée par votre Conseil Supérieur, et selon les dispositions de la Règle et des Statuts, le Conseil Général a prononcé*

*lors de la séance du 9<sup>th</sup> of September 1946*

*l'agrégation de*

**St. Peter Parish Conference - COVINGTON, LA  
Archdiocese of New Orleans, LA - USA**

*Cette lettre atteste officiellement la création de cette Conférence et son affiliation à la Société de Saint-Vincent de Paul.*

*Nous vous assurons de nos prières pour le succès de votre importante tâche au service des pauvres et vous prions d'agréer, cher(e) Président(e), l'expression de notre affectueux dévouement en Notre-Seigneur.*

enregistrée sous le n°

**22517**  
par le Secrétaire Général

Président du Conseil Supérieur

Président Général

La Société de Saint-Vincent de Paul a été fondée à Paris en 1833 par le bienheureux Frédéric Ozanam et ses compagnons. Les Conférences en sont les unités de base qui, avec les Conseils (à les regroupent), sont gouvernées par la Règle et les Statuts promulgués par l'Assemblée Générale de 2003. Les Conférences et les Conseils forment ensemble une Confédération, organisation catholique internationale composée de laïcs bénévoles, hommes et femmes (La Règle, article 1.1). Des extraits de cette même Règle sont repris ci-dessous :

**Objectifs et étendue du service**

La vocation des membres de la Société, dénommés Vincentiens, est de suivre le Christ en servant ceux qui sont dans le besoin et d'être ainsi les témoins de Son amour éternel par un contact de tendresse et de compassion. Les Conférences manifestent leur dévouement par un contact de personne à personne. La Vincentien sert dans l'espérance (art. 1.2).

Aucune œuvre de charité n'est étrangère à la Société. Son action comprend toute forme d'aide visant à soulager la souffrance ou la misère et à promouvoir la dignité et l'intégrité de l'homme dans toutes ses dimensions (art. 1.3). La Société sert ceux qui sont dans le besoin (ceux qui sont leur religion, leur milieu social ou ethnique, leur état de santé, leur sexe, leurs particularités culturelles ou leurs opinions politiques) (art. 1.4).

Fidèle à l'esprit de ses fondateurs, elle s'efforce de se renouveler sans cesse et de s'adapter aux conditions changeantes des temps. Elle donne la priorité aux plus démunis et à ceux qui sont socialement rejetés par la société (art. 1.5).

**Nos rencontres avec les pauvres**

Les Vincentiens s'attachent à établir des rapports de confiance et d'amitié. Ils ne jugent pas ceux qu'ils servent (art. 1.6) mais s'efforcent de les écouter et de se comprendre avec le cœur, au-delà des mots et des apparences (art. 1.7). En partageant l'inconfort, les dangers et le soutien des pauvres (art. 3.5), ils reconnaissent en eux le Christ souffrant (art. 1.8). Les Vincentiens essaient d'aider les pauvres à être plus libres dans la mesure du possible, et à se rendre compte (de, de façon préfèrable, ils peuvent forger et changer leur destinée de même que celle de leur entourage) (art. 1.10).

Les Vincentiens ont avec le sang fondamental de la vie intérieure et des exigences spirituelles de ceux qu'ils aident (art. 1.11).

**Spiritualité Vincentienne**

Les Vincentiens sont conscients de leurs propres faiblesses et de leur vulnérabilité, ainsi que de la nécessité de la grâce de Dieu. Ils recherchent

sa grâce et non le leur. Leur idéal est d'aider à soulager la souffrance véritablement par amour sans penser à une récompense ni à un avantage pour eux-mêmes (art. 2.2). Inspirés par saint Vincent de Paul et le bienheureux Frédéric Ozanam, ils espèrent que dans l'attention qu'ils portent aux pauvres, ceux-ci pourront entrevoir l'amour éternel de Dieu (art. 2.1). Les membres sont appelés à cheminer ensemble vers la sainteté, parce que la vraie sainteté réside dans l'union parfaite avec le Christ et dans la perfection de l'amour ; c'est là le centre de leur vocation et l'origine de sa fécondité (art. 2.3).

**Communautés de foi et d'amour**

Les membres se réunissent en frères et sœurs, le Christ étant au milieu d'eux, au sein des Conférences, véritables communautés de foi et d'amour, de prière et d'action (art. 3.2). Les réunions se déroulent dans un esprit de fraternité, de simplicité et de joie chrétiennes (art. 3.4). Quel que soit leur âge, les membres s'attachent à conserver un esprit jeune, qui se caractérise par l'enthousiasme, l'adaptabilité et l'imagination créatrice (art. 3.5).

**Œuvrer pour la justice**

La Société cherche non seulement à soulager la misère mais aussi à débarrasser les situations injustes qui en sont la cause. Les Vincentiens s'engagent à étudier les causes de la pauvreté et à contribuer à leur annulation (art. 7.1). Citoyens du même monde, ils sont appelés à participer à la création d'un ordre social plus juste et plus humain, conduisant à une "culture de la vie" et à une "cultivation de l'amour". De cette manière, la Société est associée à la mission évangélistique de l'Église par son témoignage visible en paroles et en actes (art. 7.2).

**Appartenance à la Société internationale**

Les Conférences agréées font partie intégrante de la Société de Saint-Vincent de Paul internationale. L'adhésion de la Conférence dépend de sa reconnaissance et son engagement à se conformer à la Règle et aux statuts sont les conditions nécessaires à son agrégation officielle, celle-ci lui permettant d'utiliser le logo de la Société.

## Guidelines for Effective Conferences

*(Excerpted from The Manual, P.29-30)*

- **Effective Conferences are reachable.** Parish-based Conferences must provide a clear means for being contacted. Some use the parish office address and phone number and check in regularly to retrieve messages and correspondence.
- **Effective Conferences meet regularly.** The Rule requires weekly or biweekly meetings. At these meetings, all members offer their thoughts and support for providing Christian care to the needy.
- **Effective Conferences are committed to grow in spirituality.** Members become friends, care for one another and earnestly follow the Society's religious practices. Like Christ, they identify with the poor, whom they visit promptly, regularly, and attentively.
- **Effective Conferences show initiative.** Routine, tradition, and habit do not dictate current thought and action. Can the Conference do more? Alert officers and members continually and deliberately ask, answer, and act on such questions.
- **Effective Conferences have members committed to formation.** They read, study, attend lectures and courses, and participate in training sessions organized by their District Council in order to learn more about helping people and solving problems.
- **Effective Conferences recruit continuously.** One reason Conferences give for not tackling new problems is lack of personnel. But dramatic vistas are unveiled when members invite new Vincentians to join in the service of the poor.
- **Effective Conferences have competent leaders.** The officers of the Conference handle their specific duties with whatever competence they have naturally or can cultivate. They work hard, but share with members the responsibility for decision-making and action.
- **Effective Conferences maintain ties to the community.** Helping people today often requires knowledge of and referrals to other public and private agencies. The Conference deliberately makes itself known to these groups and cultivates relationships of mutual respect to facilitate referrals to and from such agencies.
- **Effective Conferences participate in their Council activities.** The president or his proxy represents the Conference at District Council meetings. Conference members take part in general meetings and religious observances, and provide support and personnel for the special works of the District Council.
- **Effective Conferences understand the national and international dimensions of the Society.** Members show practical concern for the work of the Society in less developed or disaster-stricken areas by generously sharing their resources. If possible, they "twin" with needy Conferences domestically or internationally.
- **Effective Conferences are both wealthy and poor.** Their members generously support the work of the Conference and elicit similar generosity from friends of the Society. But the Conferences always seem poor, because they share, thoughtfully and intelligently, whatever they have. They do not save for a rainy day, knowing that many are in need here and now.

# A NEW MEMBER ADMISSION PROCESS

In order to determine if God is calling them to become a Vincentian, a prospective new member with the approval of the Conference, will be welcomed as a guest at a Conference meeting and will be given a copy of the Rule and the Member Handbook. They will also be invited to attend an Ozanam Orientation.

A prospective new member, due to their involvement in the Society's work, may be invited or may convey an interest in becoming a Vincentian as an Associate Member:

“Associate Members are those affiliated with the Society by formal action of the Conference or Council with which the member will be joined. Associate Members include those who sincerely and publicly accept the Society's Rule but may or may not belong to the Catholic Church and may or may not attend Conference meetings or engage in the works of the Society on a regular basis. Associate Members are kept informed of the developments and activities of their immediate groupings, as well as the general progress of the Society, particularly in the local area or diocese. They are invited to attend the general meetings and special observances of the Society and to participate in its charitable activities.” (*Rule: Part III-Statute 3*)

A prospective new member who may be invited or interested in becoming a Vincentian as an Active Member will be given a period of candidacy and discernment during which they will observe the Conference and participate in its activities:“

Active Members are those who participate regularly in the prayer life, meetings and charitable activities through personal contact with the poor of the Vincentian Conference. An Active Member accepts the Rule and Statutes of the Society, belongs to the Catholic Church and is received as a Vincentian brother or sister...Only Active Members hold office in the organization.” (*Rule: Part III-Statute 3*)

When a prospective new member requests to be welcomed into the Conference as a candidate for Active Membership, he/she begins an Admission Process.

## **An Admission Process for Active Membership**

1. The following is a model of an Admission Process. The candidacy and discernment period will last approximately 6 to 8 weeks and will consist of the following:
  - The Conference members will read, reflect and share their lived experiences on each section of the SVdP Member Handbook with the candidate. Each member will have a copy of the handbook.
  - A Conference member will be assigned as a sponsor for the candidate. The sponsor will meet with the candidate to respond to questions and to describe the activities of the Conference.
  - The candidate will be given the opportunity to make at least two Home Visits with different Conference members. The exception would be in a Conference with Special Works where the candidate will be given opportunities for person to person service with those who are poor.

- The Spiritual Advisor will lead the candidate in prayerful discernment emphasizing the Society's primary purpose of growth in Holiness and guiding them in Vincentian Spirituality.
  - At the conclusion of the candidacy period, the candidate will have a meeting with the President to discuss the candidate's experiences in the Conference. The candidate discusses the activities and services that they feel called to do as part of their ministry.
  - At this point, if the candidate has discerned that they have a Vincentian Vocation, they may request to become an Active Member.
2. After the President, Spiritual Advisor and the candidate discern readiness for Active membership the Conference takes formal action, normally by a resolution, to accept the candidate into Active membership. (Rule: Part III-Statute 3)
  3. The candidate is then Commissioned as a new member of the Society and given the SVdP pin. This commissioning should take place at an appropriate time and occasion, normally at a Conference or Council liturgy or at a Festival Meeting. (Rule: Part III-Statute 4)

The Commissioning Ceremony for a New Member is found in the Vincentian Celebrations book, or on-line: ([svdpusa.org/members/Tools/Spirituality-Formation/Vincentian-Prayers/Commitment and Commissioning Ceremonies](http://svdpusa.org/members/Tools/Spirituality-Formation/Vincentian-Prayers/Commitment-and-Commissioning-Ceremonies)).

4. The new member will continue walking the Vincentian Pathway through reflection and sharing on the Serving in Hope Modules and the other resources offered by the National Office. The Council will offer opportunities for Vincentian Formation by sponsoring the Ozanam Orientation, retreats and various activities. The new member will attend the Ozanam Orientation Program within a year as required by the Society. The Conference assures compliance with the (Arch)Diocesan "Safe Environment" requirements.

## Installation of a New Member

The admission of a new member delights the Vincentian family. Although not required by The Rule, Conferences traditionally celebrate the admission of new Members with a ceremony such as this one.

**Opening Song:**       *(Begin with an appropriate song)*

**President:**           As the people of God, we are called to a profound love of God and love of our neighbor. Gathered here in God's name, we testify to our common desire to be faithful in assisting one another to carry out this commandment.

Today, with joy and gratitude we join together to welcome and commission our new member. After prayer, formation and discernment, \_\_\_(Name)\_\_\_\_\_ has been proposed for membership into the \_\_\_(Name)\_\_\_\_\_ Conference of the Society of St. Vincent de Paul. Our Conference has reached a prayerful decision to invite \_\_\_(Name)\_\_\_ to share our mission in the service of those who are poor.

As a member of the Society of St. Vincent de Paul, you will witness to your love for God and your concern for God's poor. We now ask you to commit yourself to the mission that God, in His Providence has given to you.

I ask you:

Will you strive to affirm the dignity of each person by compassionate service to all those who are poor and suffering

**New Member:**       Yes, I will.

**President:**           Will you strive to grow in holiness?

**New Member:**       Yes, I will.

**President:**           Will you strive to attend meetings and to grow in friendship?

**New Member:**       Yes, I will.

**President:**           Will you strive to always promote the Mission and Values of the Society of St. Vincent de Paul?

**New Member:**       Yes, I will.

**President:**           In accepting the call to serve those who are suffering as a member of the Society of St. Vincent de Paul, do you promise to fulfill the obligations of that ministry to best of your ability?

**New Member:**       With God's help and with the help of those with whom I serve, I do promise to fulfill these obligations to the best of my ability.

**President:**           I do believe and trust that you will use your God-given gifts for the good of all who are touched by the healing mission of the Society of St. Vincent de Paul.

And now I ask all of us here present: Will you support our new member of the Society of St. Vincent de Paul by your loyalty, your support and your prayers?

**All:** We promise to support and pray for \_\_\_(Name)\_\_\_ as we together carry out the mission of the Society of St. Vincent de Paul. We ask God to bless your ministry with vision, strength and peace.

**President:** I ask all of us now to extend our hands in blessing as we commission him/her as a member of the Society by praying together:

Father, you have called \_\_\_(Name)\_\_\_ to feed the hungry, clothe the naked and comfort the afflicted in the spirit St. Vincent de Paul, Blessed Frederic Ozanam and Sister Rosalie Rendu, as a member of the Society of St. Vincent de Paul.

We pray your blessing on \_\_\_(Name)\_\_\_, and on each one of us so that together we may:

- grow in holiness,
- deepen our spirit of friendship with each other, and
- serve the poor in charity and justice, love and compassion.

Amen

It is an honor to welcome you as a member of our Conference, and I now present to you the pin of the Society of St. Vincent de Paul.

*(Symbol: A SVdP lapel pin is to be given to the new member)*

**Closing Song:** (Conclude with an appropriate song)

# Conference Annual Report

The Annual Report form, current as of April 1, 2021, is included here for your convenient reference. Before actually compiling the information to complete your report, you should always check the national Council web site and National member Database for the most recent version.



**2021**

**INSTRUCTIONS INCLUDE REPORTING ON PPP GOVERNMENT GRANTS & PERSON-TO-PERSON VISITS DURING COVID-19**

**ANNUAL CONFERENCE REPORT**

<b>Fiscal year:</b>	<b>10/1/2020 – 9/30/2021</b>	<b>1/1/2021– 12/31/2021</b>
Deadline:	<b>November 30, 2021 (60 Days)</b>	<b>January 31, 2022 (30 Days)</b>

(ARCH)DIOCESAN COUNCIL: \_\_\_\_\_ District Council: \_\_\_\_\_

CONFERENCE NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

Street City State Zip Phone

REPORTING PERIOD FROM: \_\_\_\_\_ TO \_\_\_\_\_ (12 MONTHS)

FREQUENCY OF MEETINGS (CHECK ONE): WEEKLY \_\_\_\_\_ EVERY OTHER WEEK \_\_\_\_\_ MONTHLY \_\_\_\_\_ OTHER \_\_\_\_\_

**Our Conference has formally adopted and is in compliance with the 2019 version of Bylaws for Conferences, which can be found on [www.svdpusa.org/members](http://www.svdpusa.org/members), Yes \_\_\_\_\_ No \_\_\_\_\_**

**Membership\***

(\*Ethnic breakdown required for government reporting, grant applications, etc. Please assign each member to one category only.)

	Asian	Black	Caucasian	Hispanic Latino	Alaskan Native American Indian	Native Hawaiian/ Other Pacific Islander	Mixed/ Other
Active (Full) – under 19							
Active (Full) – 19 through 39							
Active (Full) – 40 and over							
<b>Total Active (Full)</b>							

	Asian	Black	Caucasian	Hispanic Latino	Alaskan Native American Indian	Native Hawaiian/ Other Pacific Islander	Mixed/ Other
Associate – under 19							
Associate – 19 through 39							
Associate – 40 and over							
<b>Total Associate</b>							

**Total Membership**

Total Active (Full)	
Total Associate	
<b>TOTAL MEMBERS</b>	

Comparative Membership	Number	New This Year
Total All Vincentians		
Total – under 19 (Youth)		
Total – 19 through 39 (Young Adult)		
Total Minority (Non-Caucasian)		
Total Non-Vincentian Volunteers		

**Treasurer's Report (includes Receipts and Expenses from Conference, Stores and Special Works)**

<b>Last Year's Ending Balance (Required)</b>	\$
<b>Adjustments to Last Year's Ending Balance – attach an explanation</b>	\$
<b>Beginning Balance (Required)</b>	\$

**Receipts (Please round all figures to the nearest dollar)**

1. Donations from Members	\$		
2. Church/Poor Box Collections	\$		
3A. Fund Raising - Special Works (other than Stores)	\$		
3B. Receipts from Conference owned Store(s)	\$		
3C. Fund Raising - Special Events/Other	\$		
4. Contributions from other SVDP Entities	\$		
5A. Qualified Government Grants-EACH of at least \$50,000 and with admin allowance of 10% or less received. (ENTER \$0 IF EACH GRANT IS LESS THAN \$50,000)	\$		
5B. Other - Disaster Funds	\$		
5C. Other - Capital Campaign Funds	\$		
5D. Other - Other Restricted Funds	\$		
5E. Other - Misc. Receipts include any PPP funds forgiven as grants by federal government	\$		
<b>Total Receipts (1 thru 5E)</b>			<b>+ \$</b>

## Expenses (Please round all figures to the nearest dollar)

6. Those We Serve	\$		
7. Housing Assistance/Eviction Prevention	\$		
8. Disaster Contributions	\$		
9A Domestic Twinning	\$		
9B International Twinning**	\$		
<b>**Attach contact list for International Twinning Partners</b>			
<b>Subtotal (A) (6 thru 9B)</b>		\$	
10. Solidarity Contributions (Dues/Tithing)	\$		
11. Contributions to Upper Councils	\$		
12A. Operating Expense - Special Works	\$		
12B. Operating Expense - Stores	\$		
12C. Operating Expense - Special Events	\$		
12D. Operating Expense - Other	\$		
13. Other	\$		
<b>Subtotal (B) (10 thru 13)</b>		\$	
<b>Total Expenses (Subtotal A + Subtotal B)</b>			-\$
<b>Ending Balance: Beginning Balance + Total Receipts – Total Expenses =</b>			<b>\$</b>

## Visits and Services to People

(ALL RESPONSES BELOW INCLUDE CONFERENCE, STORES AND SPECIAL WORKS)

	Column 1	Column 2
<b>Person-to-Person Visits</b> <i>(See instructions for visits during COVID-19)</i>	# of Visits	# of People Helped (Includes In-Kind)
<b>A. Home Visits</b>		
B. Prison/Returning Citizens Visits		
C. Hospital Visits		
D. Eldercare Visits		
<b>E. Other In-Person Visits</b>		
<b>Total Visits and Services to People (A thru E)</b>		

## “In Kind” Services and Goods

	# of Times	“In Kind” Value
<b>“In Kind” Services</b>		
F. Legal		
G. Medical		
H. Dental		
I. Other		
<b>Subtotal 1 (F thru I)</b>		<b>\$</b>
<b>“In Kind” Goods</b>	# of Times	“In Kind” Value
J. Food		
K. Furniture		
L. Clothing		
M. Other		
<b>Subtotal 2 (J thru M)</b>		<b>\$</b>

<b>Total “In Kind” Services and Goods (F thru M)</b>		<b>\$</b>
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TOTAL HOURS OF SERVICE: MEMBERS	
TOTAL HOURS OF SERVICE: NON-MEMBERS	
ESTIMATED MILES IN VINCENTIAN SERVICES	

\_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_  
 Print Conference President Name Phone Email

\_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_  
 Print Conference Treasurer Name Phone Email

**Ideally, Conferences should enter details online. If not entered online, submit this form to your Council. Isolated Conferences should mail the completed report to:**

**Annual Report  
National Council – Society of St. Vincent de Paul  
66 Progress Parkway  
Maryland Heights, MO 63043-3706**



## INSTRUCTIONS FOR COMPLETING CONFERENCE ANNUAL REPORT

This report form is intended to promote more timely, accurate, and consistent reporting. It is essential to have your Conference annual report completed properly and returned on time so that we can responsibly publish our consolidated National results and comply with the requirements of our tax-exempt status.

This Conference report form must be used by all Conferences. **Please do not use older versions of this form.** Remember that the key to good reporting is keeping good records throughout the reporting year [i.e., monthly and quarterly reporting]. Please read these instructions carefully. More detailed explanations may be found in the Treasurer's Manual and Secretary's Minute Book. If you have any questions on reporting, contact your local Council for support.

**This report is a reflection of the Conference, its Special Works and Stores whether they are separately incorporated or not.**

Your cooperation is appreciated.

### DEFINITIONS AND QUESTIONS:

**(Arch)Diocesan Council Name:** Enter the name of the (Arch)Diocesan Council in which this Conference exists. If no (Arch)Diocesan Council exists, enter the name of the Diocese.

**District Council Name:** Enter the name of the District Council of which this Conference is part. If this is an Isolated Conference, leave this blank.

**Conference Name:** Enter the Conference Name.

**Address:** Enter the address, city, state, zip code, and phone number of the Conference.

**REPORTING PERIOD:** Always a 12-month period (shorter for new Conferences only); either the standard fiscal year of the Society (Oct. 1 – Sept. 30) or a calendar fiscal year (Jan. 1 – Dec. 31). New Conferences will typically have less data than 12 months, but the dates should reflect the fiscal year.

**OUR CONFERENCE HAS FORMALLY ADOPTED AND IS IN COMPLIANCE WITH THE 2019 VERSION OF "DOCUMENT 1: BYLAWS FOR CONFERENCES," WHICH CAN BE FOUND ON [www.svdpusa.org](http://www.svdpusa.org).** Every Conference is expected to have adopted a set of bylaws corresponding to the nationally approved set of the 2019 version bylaws that are located on our main national website. Document 1 is the standard set of bylaws that is appropriate for 99% of all Conferences. The website documents have all of the wording that has been required by IRS and approved by various resolutions of the National Council. If your Conference has adopted this set of the 2019 version of bylaws (Document 1) without changes, check off "Yes." If your Conference is using a different set of bylaws or if you are using Document 1 with modifications, check off "No." If you checked off "No,"

then your bylaws are required to have been formally approved by an upper Council or the National Vice President of your region.

**MEMBERSHIP:** This format requires a distinction between Active and Associate members and is required for determining the number of members serving in the Society in the United States.

Active (Full) Members must belong to the Catholic Church; accept the Rule, Statutes, and Basic Requirements of the Society; be accepted as an Active Member by a Conference; and be enrolled in it. In addition, they need to take part in the life of the Conference to which they belong. Participation implies a reasonable degree of involvement in SVdP meetings, charitable activities, and religious observances.

Associate Members, like Active Members, are affiliated with the Society by formal action of the Conference or Council with which the members will be joined. Associate Members include those who sincerely and publicly accept the Society's Rule but may or may not belong to the Catholic Church. Associate Members are kept informed of the developments and activities of their immediate groupings, as well as the general progress of the Society, particularly in the local area or diocese. Associate Members are invited to attend the general meetings and special observances of the Society. They participate, as they are able, in the charitable activities of the Society in their area. Conferences should have a specific list of Associate Members. The National membership database allows for membership type to be identified.

**COMPARATIVE MEMBERSHIP:** This section is a recap of the total membership in comparison to age groups focusing on youth (under 19), young adult (19 through 39), total minorities and total volunteers that are not otherwise members of the Society.

**TREASURER'S REPORT:** This portion of the report includes the combined financial data from the Conference, its stores, and its special works. Please keep in mind that this is not a reconciliation of a single account. **This reflects all activity in all accounts.**

**Balance Forward** – when entering Balance information, include the balances of **ALL accounts** owned by the Conference: checking, savings, CDs, investment accounts, reserve accounts, store accounts, special works accounts, etc.

1. Last Year's Ending Balance: This is the Ending Balance as it appeared on last year's Annual Conference Report.
2. Adjustments to Last Year's Ending Balance: It sometimes happens that, after a report is submitted, an error shows up that needs to be corrected, affecting the ending balance. Enter any adjustments here that would correct last year's ending balance. Please attach an explanation. **NOTE: These instructions, to attach an explanation for adjustments made to last year's ending balance, only applies to hard copy annual report form submissions. The online annual report instructions do not require an explanation for adjustments made to last year's ending balance.**
3. Beginning Balance: Apply the adjustments to last year's ending balance and show the true beginning balance for this year.

TREASURER'S REPORT: Receipts

1. Donations from Members: Financial contributions from Active, Associate and Contributing Vincentian Members, including the secret collection taken up at Conference Meetings. It is not necessary to try to isolate and count checks from Members that come through Church collections.
2. Church/Poor Box Collections: Includes financial support from Church collections, Poor Box Collections, alms from distribution of religious papers at the Church door, allocations from parish funds, and other Church-related offerings.
- 3A. Fund Raising - Special Works: Enter the total gross income from all Special Works operated by the Conference. (other than Stores)
- 3B. Receipts from Conference owned Store(s): Enter the total gross income from all thrift stores operated by the Conference. On the Stores Report, this item is titled "Total Revenue."
- 3C. Fund Raising – Special Events/Other: This includes donations not made in Church and financial support from activities not directly or exclusively Church-centered, such as suppers, and memorial donations. Fund Raising activities generally include all activities in which financial support is actively solicited (this includes Friends of the Poor Walk donations).
4. Contributions from other SVDP Entities: Includes financial support received by your Conference from any other Vincentian Councils, Conferences, and stores or special works not owned by your Conference. Friends of the Poor Grants are to be included here. Do not include funds that are transferred to the Conference from the stores and special works that the Conference owns and operates.
- 5A. Other – Qualified Government Grants Only: This includes ONLY grants received from federal, state, and local government agencies that individually exceed \$50,000 with documentation that the grant provides an administrative allowance of ten percent or less. **DO NOT ENTER ANY AMOUNT LESS THAN \$50,000.**

All other grants (**\$50,000 & under**) are to be included in 5D below (Other – Other Restricted Funds).

- 5B. Other – Disaster Funds: This includes all money received for local disasters for which a special non-operating fund has been established. For example, if your Conference area suffered from a tornado, hurricane or other disaster for which a special non-operating fund has been established, it can be included here.
- 5C. Other – Capital Campaign Funds: This includes all money received for a formally defined, non-operating capital campaign fund for your Conference. For example, if your Conference has established a capital campaign to raise funds to build a new pantry/office or make major renovations to an existing one, then the funds collected are restricted for that use and can be included here.
- 5D. Other – Other Restricted Funds: This includes all funds received for special projects for which a fundraising campaign was designated. For example, if your Conference has a special campaign to raise funds for a Back-To-School Program, then the funds collected are restricted for that use. This DOES NOT include "memo" designations on checks or special Conference-designated funds. For example, if someone writes "for food" on their check in the memo area, these would not be considered restricted funds. Also, Conference-designations

such as part of a budget do not restrict funds. This category also includes all grants that are not qualified and included in 5A above.

- 5E. Other – Miscellaneous Receipts: All other sources of income (e.g., interest, bank adjustments, legacies, etc.) **include any PPP funds forgiven that become grants as officially recognized and declared by the federal government. For SVDP purposes those SVdP Conferences who received PPP funds should record these grant funds in the annual report as other income or miscellaneous receipts.**

## **TREASURER’S REPORT: Expenses**

6. Those We Served: All funds expended for goods and services provided to those we served, including cash, checks, certificates, bus tickets, and gift cards. The principal method for payment of aid will be check, paid directly to the provider of those goods or services. This also includes the cost of food purchased to stock your food pantry. For those Conferences that operate stores and other Special Works, this includes dollars spent for direct aid to those in need.
7. Housing Assistance/Eviction Prevention: Funds expended for housing assistance to those we serve, including rental assistance, rental eviction prevention, mortgage and foreclosure assistance as well as hotel/motel stays are forms of housing assistance. This will allow us to measure the financial help provided annually for housing. The amount in line 7 must not be included in the amount in line 6
8. Disaster Contributions: Include all monies expended for disaster relief locally, nationally, and internationally.
9. A. Domestic Twinning: Funds sent to another domestic (within the United States) Conference or Council (over and above the solidarity contribution).
- B. International Twinning: Funds sent to a Conference or Council outside of the United States.
10. Solidarity Contribution: The Annual solidarity contribution to upper Councils.
11. Contributions to Upper Councils: Funds sent to an upper Council (over and above disaster, Twinning, and solidarity contributions).
- 12A. Operating Expense – Special Works: This includes all funds expended to operate Special Works. This DOES NOT include dollars spent as direct aid to those in need from those special works. Direct aid to those in need is not an operational expense.
- 12B. Operating Expense - Stores: This includes all funds expended to operate Stores. This DOES NOT include dollars spent as direct aid to those in need from those stores. Direct aid to those in need is not an operational expense. On the Stores Report, this item is titled “Total Expenses (Wages, Benefits, Operating).”
- 12C. Operating Expense – Special Events: This includes all funds expended for fund raising events such as dinners, Friends of the Poor Walk, memorial donations, etc.

12D.. Operating Expense - Other: Include Conference operational expenses such as postage, stationery, printing, phone, travel, and similar expenses, as well as any rent or utilities paid by the Conference for use of facilities.

13. Other: All other expenditures not covered by another category. (Please attach an explanation.)

**REMEMBER:**

	BEGINNING BALANCE
+	TOTAL RECEIPTS
-	TOTAL EXPENSES
=	ENDING BALANCE

**VISITS AND SERVICES TO PEOPLE:** This portion of the report includes the combined statistical data from the Conference, its stores, and its special works.

### PERSON-TO-PERSON VISITS

**How to report Person-to-Person Visits during the COVID-19 pandemic, effective March 2020:**

**Vincentians who are actually doing home visits and going into the homes of our friends in need should report their encounters under: "A. Home Visits."**

**For visits by phone, Zoom (or other electronic video devices), public spaces such as parks or buildings, should report these visits as "E. Other In-Person Visits."**

The “number of people helped” during the visits must include the number of people helped with In-Kind goods and Services. “In Kind” refers to non-cash contributions: anything (food, furniture, clothing, services, other) that the Conferences receive at no cost and pass on directly to a family or individual or use internally by and for the Conference. In-Kind Food should reflect only what was donated – not what was purchased.

Help is only given through some type of visit. For example, if you give food to a family or give them a voucher for food, it happens while visiting with the family either in their home or at another location.

- A. Home Visits: Visits to a person’s home; sometimes more than one home visit is required. If you visit a family of four, three times, you should count 12 people helped (4 people x 3 visits).  
**See top of page 8 of the instructions for visits during COVID-19.**
- B. Prison/Returning Citizens Visits: Person-to-person visits to prisoners and/or returning citizens. Identify councils or conferences visiting prison facilities and visits with those who have been released from prison and have returned to society from serving prison time. If you visit three persons once a month for a year, you should report 36 people helped (3 prisoners/returning citizens helped x 12 visits).
- C. Hospital Visits: Patients visited at a hospital. (Two members visiting the same patient counts as one visit.)

- D. **Eldercare Visits:** Occur each time a visit is made to a nursing home, rest home, convalescent hospital, or a facility for the aged (e.g., retirement, assisted living). (Two members visiting the same patient counts as one visit.)
- E. **Other In-Person Visits:** Includes any personal contact that is other than a home visit: pantry, parish office, special work location, gas station, restaurant, and any other place other than the home where we would meet someone in need. This would also include telephone contact.  
**See top of page 8 of the instructions for visits during COVID-19**

**Total Visits and Services to People:** If you provide a family multiple help (e.g., “in kind” goods, a home visit), show it as 1 home visit, 4 people helped (parents with two children). Number of people helped is 4 (show under “Home Visit”).

**Total Visits:** Total of (A) through (E). Show both total number of visits and total people helped.

**Total People Helped:** Total visits (A through E) to get the total number of people helped.

**“In Kind” Services and Goods:** (F through M)

“In Kind” refers to non-cash contributions: anything (food, furniture, clothing, services, other) that the Conferences receive at no cost and pass on directly to a family or individual or use internally by and for the Conference. In-Kind should reflect only what was donated – not what was purchased. Enter the number of times the service or goods was offered and the value of those services or goods.

**Total Hours of Service: Members:** All member hours spent in *any* activity relative to the Society of St. Vincent de Paul, including all hours helping people, attending meetings, travel time, workshops, SVdP spiritual gatherings, etc. Include member hours of service at the Conference owned stores or special works. Do NOT include member hours worked at a store or special work NOT OWNED by the Conference.

**Total Hours of Service: Non-Members:** This includes hours of service at the Conference owned stores or special works that are work by non-Vincentians, community service hours, court ordered hours, etc.

**Estimated Miles in Vincentian Service:** Estimated miles driven by members to assist those we serve and related meetings.