



2023

QUARTERLY CONFERENCE REPORT

FY Oct 1 – Sept 30

Q1	Q2	Q3	Q4
(10/1/2022 – 12/31/2022)	(01/01/2023 – 3/31/2023)	(04/01/2023 – 6/30/2023)	(07/01/2023 – 9/30/2023)

FY Jan 1 – Dec 31

Q1	Q2	Q3	Q4
(01/01/2023 – 3/31/2023)	(04/01/2023 – 6/30/2023)	(07/01/2023 – 9/30/2023)	(10/01/2023 – 12/31/2023)

(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 <https://members.ssvpusa.org/governance/>, 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) – 18 and under							
Active (Full) – 19 through 29							
Active (Full) – 30 through 39							
Active (Full) – 40 through 55							
Active (Full) – 56 through 70							
Active (Full) – 71 and over							
Total Active (Full)							

	Asian	Black	Caucasian	Hispanic Latino	Alaskan Native American Indian	Native Hawaiian/ Other Pacific Islander	Mixed/ Other
Associate – 18 and under							
Associate – 19 through 29							
Associate – 30 through 39							
Associate – 40 through 55							
Associate – 56 through 70							
Associate – 71 and over							
Total Associate							

Total Membership

Total Active (Full)	
Total Associate	
TOTAL MEMBERS	

Comparative Membership	Number	New This Year
Total All Vincentians		
Total – 18 and under (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)

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

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	\$		
Total Receipts (1 thru 5E)			+\$

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**	\$		
**Attach contact list for International Twinning Partners			
Subtotal (A) (6 thru 9B)		\$	
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	\$		
Subtotal (B) (10 thru 13)		\$	
Total Expenses (Subtotal A + Subtotal B)			-\$
Ending Balance: Beginning Balance + Total Receipts – Total Expenses =			\$

Visits and Services to People

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

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

“In Kind” Services and Goods

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

Total “In Kind” Services and Goods (F thru M)		\$
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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 QUARTERLY REPORT

NOTE: These are primarily annual reporting instructions and revised for quarterly reporting only where feasible.

This report form is intended to promote more timely, accurate, and consistent reporting. It is essential to have your Conference quarterly report completed properly to ensure the final Conference annual report is completed 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 annual report form must be used by all Conferences. Whereas the quarterly report is a preliminary report for local use and is not required to be filed with national. Please do not use older versions of the annual report form. Remember that the key to good reporting is keeping good records throughout the reporting year and quarterly report use can help with that. Please read these instructions carefully. For annual reports, 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 quarterly 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: For quarterly reporting there is a 3-months period in 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. 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 90% 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: Our effort is to capture the age groups of our members to better identify those who serve others and provide communication to our Vincentian members in medium and platforms for each age group audience.

This format requires a distinction between Active and Associate members by age groups shown in the table on page 1 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 Quarter’s Ending Balance: This is the Ending Balance as it appeared on last Quarterly Conference Report.
2. Adjustments to Last Quarter’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 quarter’s ending balance. Please attach an explanation. **NOTE: These instructions, to attach an explanation for adjustments made to last quarter’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 quarter’s ending balance.**

3. Beginning Balance: Apply the adjustments to last quarter's ending balance and show the true beginning balance for this quarter.

TREASURER'S REPORT: Receipts

1. Donations from Members: Financial contributions from Active and Associate 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. Member donations which come through any type of Church collections are counted under "Church and Poor Box Collections", not under "Donations from Members".

Examples: Secret collections
Online donations from Members
Separate checks from Members
Donations from Members for breakfasts following Mass

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. Also includes donations made directly to SVdP via online donations and individual checks.

Examples: Church collections received via check from the church
5th Sunday SVdP collection
Online donations to the Conference from non-members
Individual Checks from non-members
Unrestricted grants from the (Arch)Diocese

- 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). This is the gross amount collected, not the net profit. See also 11C.

Examples: Friends of the Poor Walk/Run
Bake sales
Rummage sale proceeds
Memorial 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 for a specific purpose unless qualified and included in 5A above.

Examples: Funds requested for a Christmas or Back-to-School Program
Grant designated for a specific project or purpose (such as rent assistance) from any non-Vincentian organization (including church-related)

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.**

Examples: Bank interest
Bank adjustments
Legacies (money left in a will)
Employer donation-matching program
Donor-advised funds
Unrestricted grants from any non-Vincentian organizations

Note: Donated gift cards are considered “in-kind” donations, not financial donations.

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.

Examples: Food purchased for food pantry
Utility assistance payments
Gift cards purchased to give to those we serve

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. Note: These funds must be disbursed through the National Council International Twinning Program.

10. Solidarity Contribution: The Annual solidarity contribution to upper Councils, and any expenses invoiced to a Conference by its Council.

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.
Note: Profit on fundraising = Income in 3C minus Expenses in 12C

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.

Note: This normally is not zero.

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

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 to set up interviews or follow ups to an original visit, 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. ***Sometimes Conferences purchase items for in-kind use to give away, such as food or gift cards. When these items are “purchased” to give away as in-kind goods the cost of the purchase is an expense. It is entered under EXPENSES line 6.***

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).
- 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); for quarterly reporting divide by 4.
- 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, **hospice care visits** 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.

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.