



# CONFERENCE PRESIDENT SURVIVAL KIT

National Leadership Task Force  
Kathy Iberle, Bill Soucie, Marty Cormack

Revised: July 10, 2023



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NATIONAL COUNCIL OF THE USA

# THREE HANDOUTS



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# CORPORATE IDENTITY STATEMENT QR CODE



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## ANNUAL CALENDAR QR CODE



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## IDEAS FOR DELEGATION QR CODE



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# OPENING PRAYER

Jesus Christ, Evangelizer and Servant of the poor, you taught us to serve the least among us just as we would serve You. In Your example of humility, You showed us how to serve and not to be served. Help us to remain humble both in leadership and in service.

We ask that You accept our humble efforts and bless our work. May it serve the needs of Your poor, our own growth in spirit, and the sustained good works of the Society of St. Vincent de Paul. Amen.



# AGENDA

- Accountability – What Does That Mean
- Administrative Survival Kit
  - Your Basic Resources
  - Corporate Identity Statement
  - Annual Planning Calendar
  - Ideas for Delegation
- Other resources and further study
- Q&A



# WHY ACCOUNTABILITY?

Series of webinars from Leadership Training Task Force:

- Effective Conference Meetings
- Seven Duties of a Conference President
- Five Goals of a Conference President
- Servant Leadership and Our Vocation
- Preparing the Online Annual Report
- Management and Accountability for Conferences
- Governance 101: Beyond the Rule

Offered annually

Recorded versions  
also available:  
[Leadership Training](#)  
webpage



Survival Kit for  
Conference Presidents





# VINCENTIAN ACCOUNTABILITY



Handle funds responsibly

Maintain parish's and public's trust in the Society

Prevent legal and financial problems



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# WE ARE ACCOUNTABLE TO...

- Those We Serve – they are our masters
- Donors – we use their financial support
- The Church & Our Parish – we use their name & resources
- Society of St. Vincent de Paul – we use the name and reputation
- U.S. and State Governments – maintain our tax exemption
- Members and General Public – maintain trust & support



# IT'S A LOT OF ACCOUNTABILITY...

## **National and State Laws**

- ✓ 501(c)(3) IRS Exemption
- ✓ Donation Receipts with EIN
- ✓ *IRS Form 990*
- ✓ *1099s for rent assistance*
- ✓ *State Corporate Report*
- ✓ Conference Bylaws

## **Diocese and Parish**

- ✓ Regular reports to Parish
- ✓ Safe Environment Training

## **Society of St. Vincent de Paul**

- ✓ Adherence to our Rule
- ✓ Aggregation
- ✓ Annual Report
- ✓ Members Portal
- ✓ Solidarity Contribution
- ✓ Ozanam Orientation Attendance

## **Conference**

- ✓ Conference Guidelines, Policies and Procedures
- ✓ Insurance Coverage
- ✓ Financial reports to members



# DO NOT DESPAIR!

We're going to

- Show you some ways to navigate the requirements.
- Explain some of the trickier bits, like incorporation.
- Provide some tools to make it easier.
- Point you to resources.

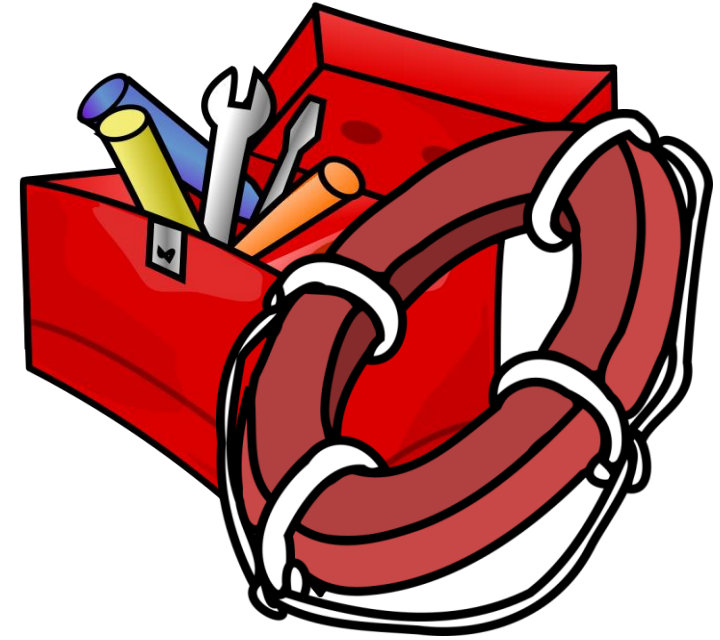
Before adopting any of these, please check with your council first!

- Some councils have council-specific procedures in some areas.
- Some councils provide some accountability services on behalf of their conferences



# SURVIVAL KIT CONTENTS

- Resource List
- Corporate Identity Statement Template
- Annual Calendar Template
- Ideas for Delegation
- A sense of humor
- Prayer!



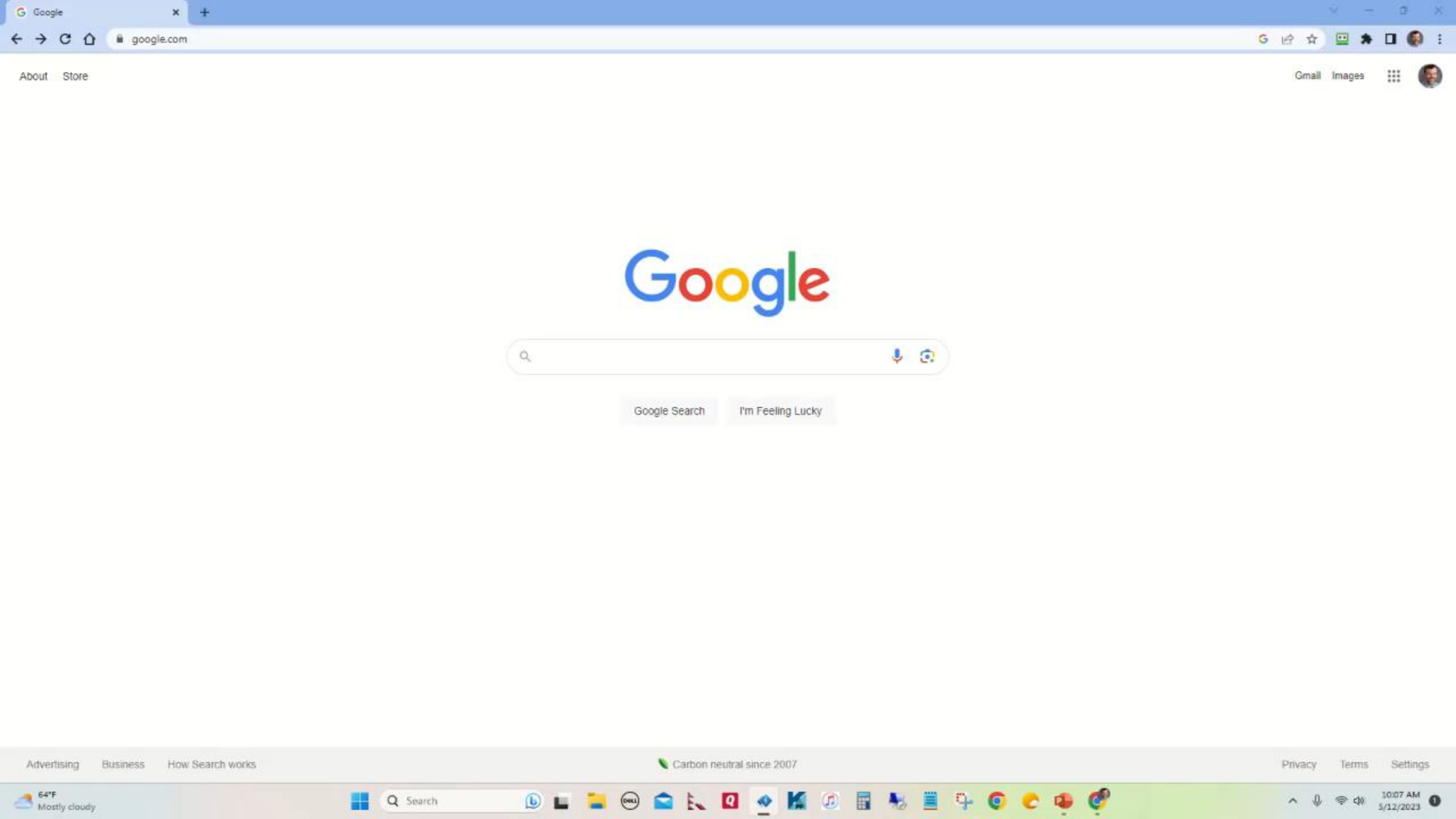
“Whatever you ask for in prayer with faith, you will receive” Mt 21:22



# RESOURCE LIST



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# RESOURCE LIST

A Conference President should have these basics on hand:

## +Basics for Leadership

- The Rule
- The Manual

## +Conference Presidents

- Conference President's Handbook
- Meeting Prayer/Agenda Card
- Your conference's Bylaws  
(All About Bylaws)

## +Conference Treasurers

- Treasurer's Handbook
- Conference Audit Manual

## +Conference Secretaries

- Secretary's Minute Book

These are on the [Leadership Resources](https://members.ssvpusa.org/leadership) page  
<https://members.ssvpusa.org/leadership>





# CORPORATE IDENTITY STATEMENT



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# CORPORATE IDENTITY STATEMENT

- A list of the detailed information you need occasionally
  - Your EIN
  - Legal name of Conference
  - Account numbers
  - Etc.
- We call this a ‘Corporate Identity Statement’.
- One-stop shopping for administrative stuff.

**<Conference Legal Name Here>**  
**Important Legal and Other Information**  
Last updated: <date>  
*See instructions on back of page*

**Who Are We? within the Society of St. Vincent de Paul**

- o Our name in Council Records:
- o Our parent Council:
- o Date of Aggregation: |
- o Location of Aggregation document:

**Who Are We? State and U.S. Identity:**

- o Our legal name:
- o The EIN/TIN we use:
- o Are we separately incorporated? Yes No
  - o If separately incorporated, our state corporation identifier:  
NNNN - State of < >
- o Location of bylaws:
- o Date bylaws last revised:

**Critical Administration Information:**

- o **Mailing address:** <address to which mail is delivered>
  - o Who checks the mail and how often:
  - o Who else has keys or access to the mail:
- o **Bank account** - <bank name> / <branch location>
  - o <address>
  - o Account number:
  - o Check signing authority held by: <list all parties>
  - o Who has the checkbook:
  - o Who has debit/credit cards:
- o **Insurance:** <name of coverage, e.g. General Liability>
  - o Insurance company name:
  - o Address:
  - o Phone/Fax:
  - o Name and email of our account manager:
  - o Account number:
  - o Policy number:
- o **Records:**
  - o Where are your financial records and books located?
  - o Where are Conference policies and procedures located?
  - o Where are your case records located?
  - o Who has the login and password to any computers which contain Conference records?



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# IDENTITY WITHIN THE SOCIETY



- First section describes your identity within the Society of St. Vincent de Paul.

## **Who Are We? within the Society of St. Vincent de Paul**

- **Our name in Council Records:**
- **Our parent Council:**
- **Date of Aggregation:**
- **Location of Aggregation document:**



# LEGAL IDENTITY



- Second section describes your identity under U.S. law.
- This is critical information you need!
- But what does it all mean?

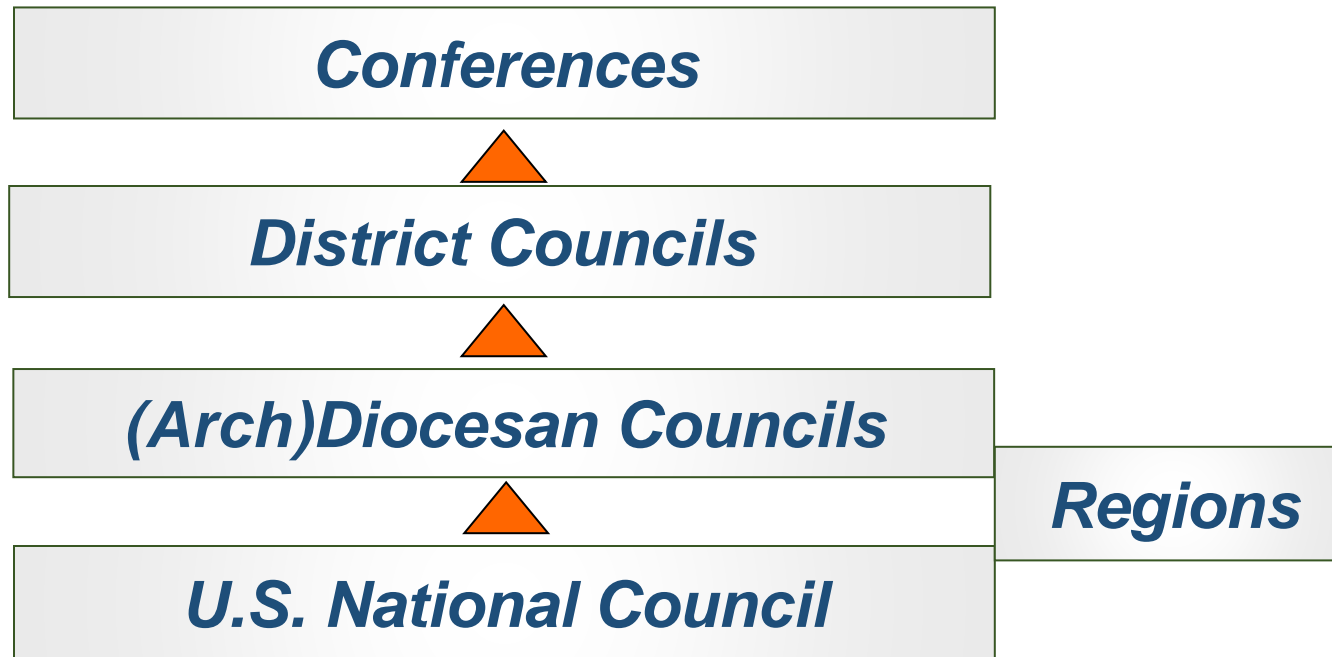
## **Who Are We? State and U.S. Identity:**

- **Our legal name:**
- **The EIN/TIN we use:**
- **Are we separately incorporated? Yes No**
  - **If separately incorporated, our state corporation identifier:**  
NNNN - State of < >



# CORPORATIONS AND ST. VINCENT DE PAUL

Internationally, the Society is organized like this:



BUT we also have to exist legally *within U.S. and state laws.*

This legal existence in the U.S. is called your **Corporate Structure.**



# WHAT IS INCORPORATION?

- Incorporation creates a legally recognized entity – a *corporation*.
- This entity or **corporation** has:
  - an official legal name
  - bylaws
  - a mailing address
  - one or more “agents”
- A corporation is **incorporated** under the laws of its home state.
- Must be incorporated to obtain a 501(c)(3) tax exemption ruling.



# WHAT DOES A CORPORATION DO?

- A corporation has legal & tax responsibility for itself *and* for all its subunits.
- Has a federal EIN or TIN (Tax Identification Number)
- A nonprofit corporation with a 501(c)3 exemption:
  - Must file a 990 annually
  - Must file 1099s for rent assistance over a certain amount
  - Must send receipts for donations
  - Surprising number of other “musts”

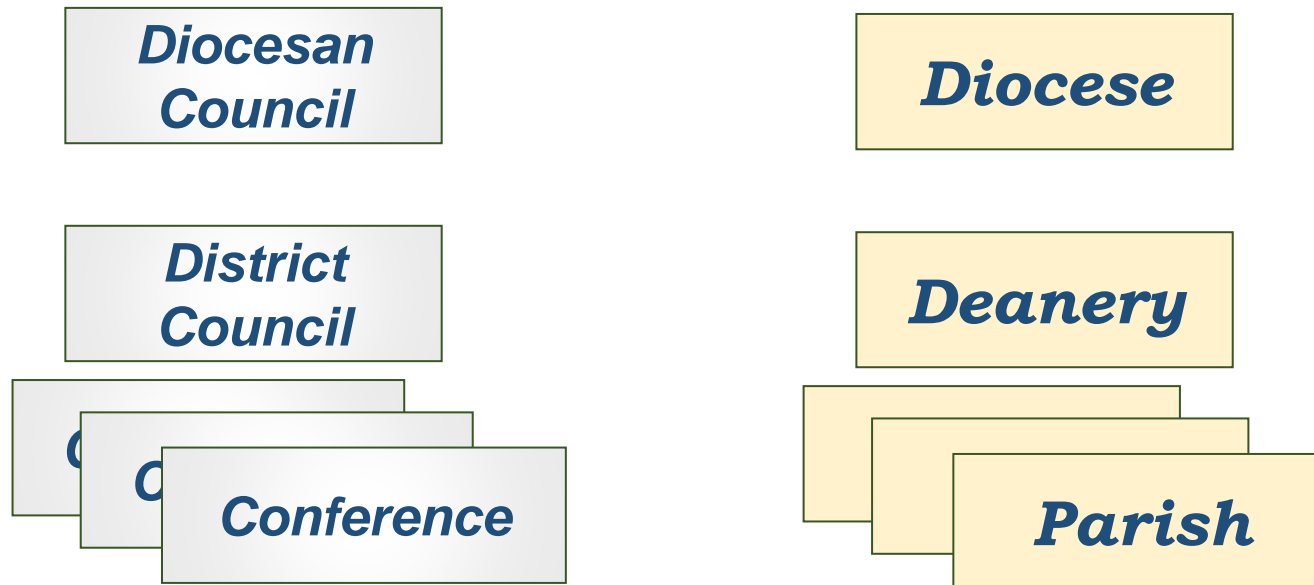
***Who does all this stuff?***



# WE DO – *NOT* THE PARISH

Our Conferences and Councils are legally  
**independent of the U.S. Catholic Church.**

## Two parallel structures



We work closely with our parishes,  
but...

- The parish ***is not*** responsible for our legal and tax obligations.
- The parish does not supply insurance for us.
- The Conference ***cannot*** use the parish EIN.

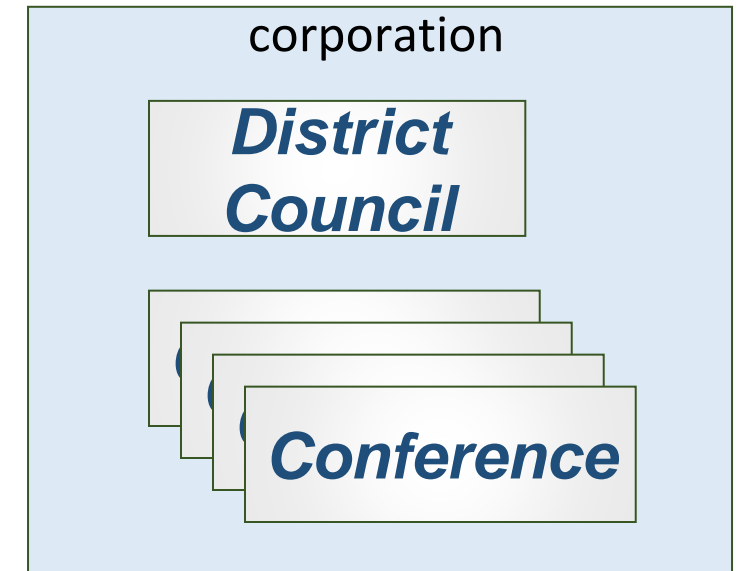
Whose EIN does the Conference use?





# IT DEPENDS....

- Responsibilities depend on how you and your Council are incorporated.
- This has been done in a variety of ways.
- The most common method:  
Council and Conferences are **combined** into a single corporation.
- All Conferences use Council's EIN.
- Council files one 990 for the whole group.
- Council directs administration/bookkeeping.



# OTHER WAYS TO INCORPORATE

All Conferences are  
**separately incorporated**

(also referred to as a  
Stand-alone Legal Entity or SALE)

***District  
Council***

***Conference***

***Conference***

***Conference***

***Conference***

**Hybrid Council:**

Some Conferences are **combined**  
with Council. Others are  
**separately incorporated.**

***District  
Council***

***Conference***

***Conference***

***Conference***

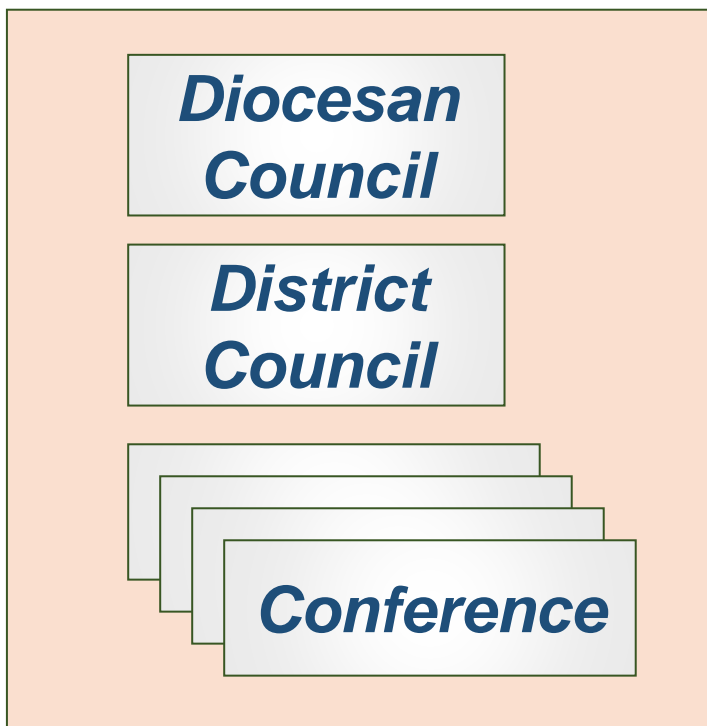
***Conference***



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# STILL MORE WAYS TO INCORPORATE

All Conferences and District Councils  
**combined** into the **Diocesan Council**



The Diocesan Council is the Stand-Alone Legal Entity.  
District Councils are not separately incorporated.

A few **Isolated** Conferences depend on the National Council for 501(c)(3) exemption.

**Conference**

The Conference **does not** use the parish EIN.



# OTHER CONFERENCE CONFIGURATIONS

- We are aware of other conference/council configurations
- If your configuration does not match, or you are unsure, consult with your district or diocesan council for advice.



# YOUR LEGAL IDENTITY



- Is my Conference separately incorporated?  
Or combined with my Council?

## Who Are We? State and U.S. Identity:

- Our legal name:
- The EIN/TIN we use:
- Are we separately incorporated? Yes No
  - If separately incorporated, our state corporation identifier:  
NNNN - State of < >



# WHAT IS OUR CORPORATE STATUS?

- Tip: Who files the 990 stating your income?
  - The Council does it ☐ you are **combined** into the Council's corporation.
  - The Conference does it ☐ you are **separately incorporated**.
- If you don't know
  - Ask your Council president or executive director
  - Look at 501c3 tab for your Conference in the Members Portal (National Database)
  - Note: If no one is filing a 990, or it appears you are using parish EIN, you should contact the following National office:
    - National Director of Governance & Membership Services (314-576-3993, ext. 214).



# YOUR LEGAL IDENTITY



- Is my Conference separately incorporated?  
Or combined with my District Council?

## Who Are We? State and U.S. Identity:

- Our legal name:
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- Are we separately incorporated? Yes No
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Circle the correct answer.



# RESPONSIBILITIES OF A CONFERENCE

Your responsibilities depend  
on your incorporation structure.

- Combined Conferences have fewer responsibilities and fewer options on how to do things.
- Separately incorporated Conferences have more responsibilities and more options.

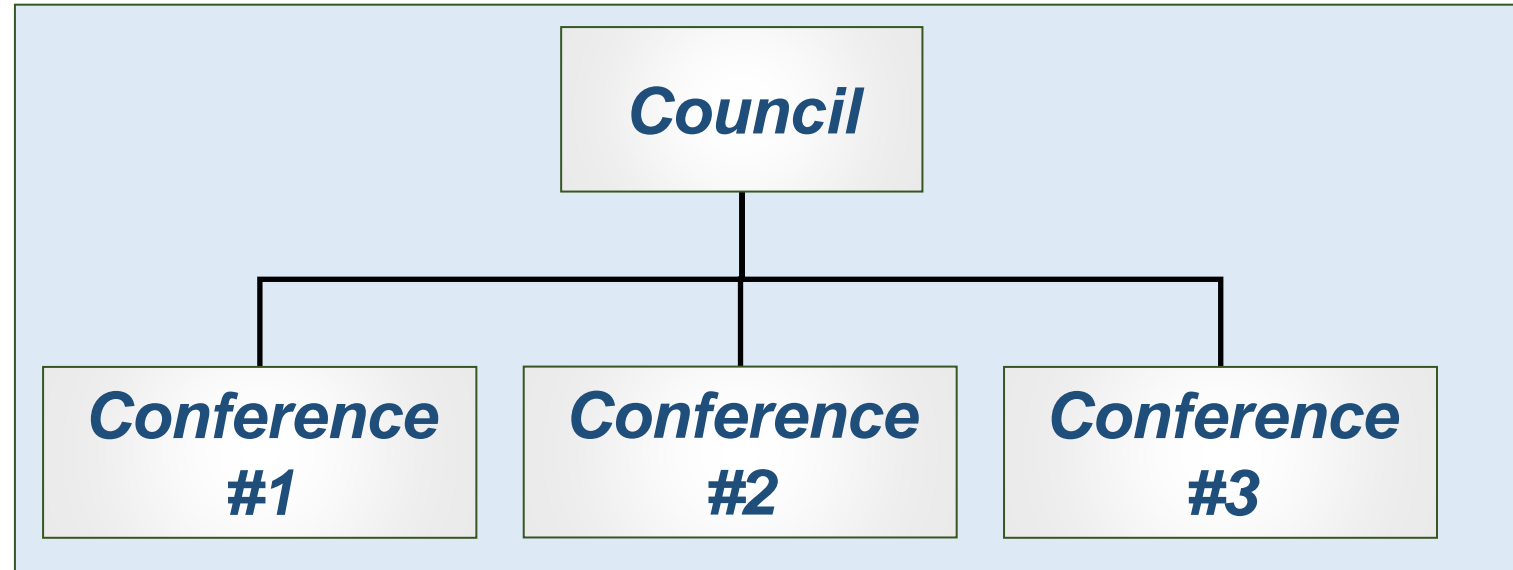




# CONFERENCES COMBINED WITH THEIR COUNCIL

The **Council** is responsible for:

- Filing 990
- Filing 1099s
- Donation receipts – though it is often delegated to the Conferences



The **Conferences**:

- Are sub-units of the Corporation
- Have no legal existence independent of their Council
- Share Council EIN - must get permission when using EIN
- Have legal names which include the name of its Council



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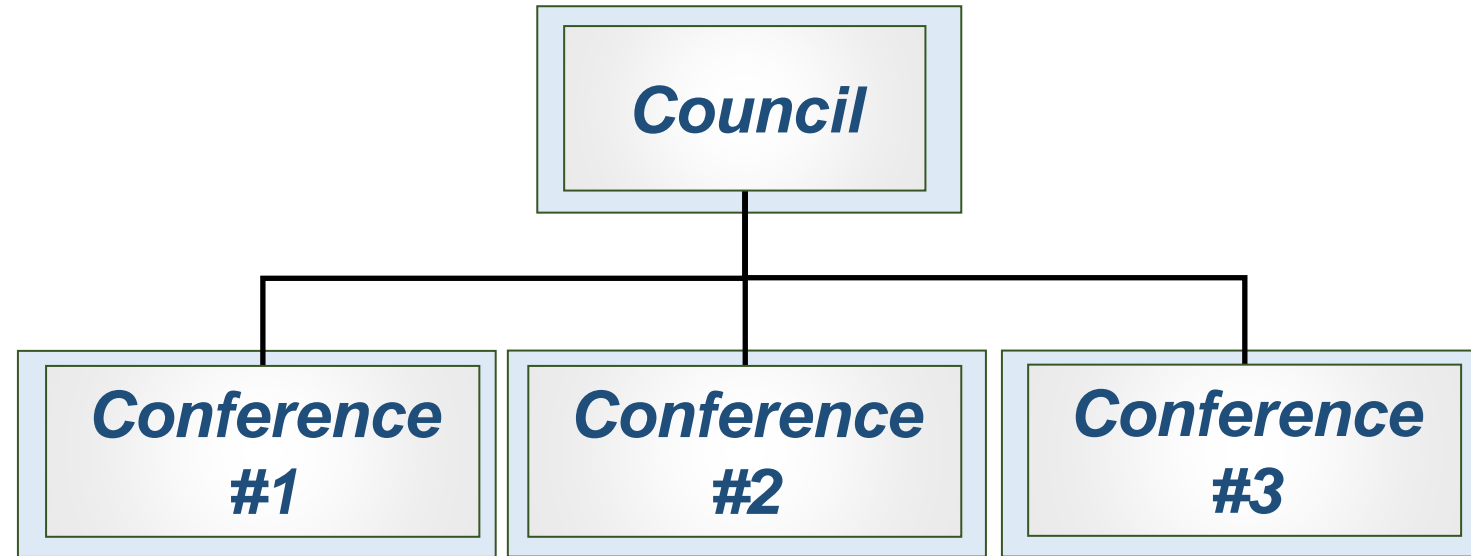
***“River City District Council DBA  
St. Thomas Conference”***

# SEPARATELY INCORPORATED CONFERENCES

## Each Conference is responsible for:

- Filing its 990
- Sending its 1099s
- Issuing its donation receipts
- Annual renewal of corporate status

**You are still part of your District Council!**



## Each Conference:

- Exists as a stand-alone corporation.
- Has its own EIN and its own 501(c)(3) exemption.
- Has a legal name which *does not include the Council name*.



# OTHER ADMINISTRATIVE INFORMATION

- Mailing Address
- Bank Account Information
- Insurance
- Location of Conference records
- Etc.

Your homework: finish filling out your corporate identity statement



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<Conference Legal Name Here>  
**Important Legal and Other Information**  
Last updated: <date>  
*See instructions on back of page*

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- Location of bylaws:
- Date bylaws last revised:

**Critical Administration Information:**

- **Mailing address:** <address to which mail is delivered>
  - Who checks the mail and how often:
  - Who else has keys or access to the mail:
- **Bank account** - <bank name> / <branch location>
  - <address>
  - Account number:
  - Check signing authority held by: <list all parties>
  - Who has the checkbook:
  - Who has debit/credit cards:
- **Insurance:** <name of coverage, e.g. General Liability>
  - Insurance company name:
  - Address:
  - Phone/Fax:
  - Name and email of our account manager:
  - Account number:
  - Policy number:
- **Records:**
  - Where are your financial records and books located?
  - Where are Conference policies and procedures located?
  - Where are your case records located?
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# ANNUAL CALENDAR



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# ANNUAL CALENDAR



- Now we know our responsibilities –  
How can we keep track of all the tasks?
- Most accountability items require action either once a year or (roughly) quarterly.
- A simple one-page calendar makes it **much** easier to keep track.
- The calendar also makes it easier to plan Conference activities.



# SAMPLE CALENDAR

- One page, checklist-style.
- Your calendar will be unique to you!
- Template is in "Conference Presidents" accordion in <https://members.ssvpusa.org/leadership/>

<b>Fiscal Year Calendar for Conference XXX</b> A calendar of recurring obligations, tasks, and events EXAMPLE ONLY	
<b>October</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare conference annual report</li> <li><input type="checkbox"/> Set Conference meeting dates (at least 2/month)</li> <li><input type="checkbox"/> Food pantry schedule to Parish Bulletin</li> <li><input type="checkbox"/> Regional meeting future date</li> <li><input type="checkbox"/> National assembly meeting future date</li> </ul>	<b>April</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Quarterly Report to pastor</li> <li><input type="checkbox"/> Safe Environment training status review</li> <li><input type="checkbox"/> Ozanam Sunday</li> <li><input type="checkbox"/> Start planning for Friends of the Poor Walk/Run fundraising event (to be held in September)</li> </ul>
<b>November</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Solidarity contribution to District Council or National Council due</li> <li><input type="checkbox"/> Provide the completed conference annual report to District Council and to the pastor</li> </ul>	<b>May</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Conference Retreat</li> <li><input type="checkbox"/> Document retention review</li> <li><input type="checkbox"/> May 9 – St. Louise de Marillac Feast Day</li> </ul>
<b>December</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> District Council meeting</li> </ul>	<b>June</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> District Council meeting</li> <li><input type="checkbox"/> ** Conduct conference president election</li> </ul>
<b>January</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare 1099 and 990 forms for submission to IRS (independent Conferences only)</li> <li><input type="checkbox"/> Mail donation confirmation letters to donors</li> <li><input type="checkbox"/> Financial Quarterly report to pastor</li> </ul>	<b>July</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Quarterly Report to pastor</li> <li><input type="checkbox"/> Review of policies and procedures</li> </ul>
<b>February</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> February 7<sup>th</sup> – Blessed Rosalie Rendu Feast Day</li> <li><input type="checkbox"/> Form 3-person committee for self-audit {link to website for audit procedure}</li> </ul>	<b>August</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Organize Invitation to Serve member recruitment program {link to national website}</li> <li><input type="checkbox"/> National Assembly meeting date</li> </ul>
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# CREATE YOUR CONFERENCE CALENDAR

1. Start with activities whose dates are set by **the IRS or Councils.**
2. Add activities whose dates are set by **your Conference.**
  - a. These are the things you do every year.
  - b. Special projects, fundraisers, retreats.
  - c. Administration specific to your Conference – e.g. insurance payment.
3. Then add annual activities whose dates are **flexible.**
  - a. You can choose the month for each one.
  - b. Spread these out over the year.



# 1) DATES SET BY IRS OR COUNCIL

- Annual report to District Council: October/November
- Solidarity Contribution: November 1
- **Year-end donation receipts: January/early February**
- **Conference president election: recommend completing by June**
- District Council meetings
- (optional) Regional meeting or National Assembly
- Ozanam Orientation(s)

If separately incorporated:

- **Report 1099 information to IRS: Jan 31**
- **Submission of form 990: usually Feb** (depends on your fiscal year)

**Boldface: necessary to maintain legal standing**





## 2) DATES SET BY CONFERENCE HISTORY

- Key fund raiser dates (e.g. Friends of the Poor Walk/Run, Grocery store food drive, Dinner event, etc.)
- Special project dates (e.g., coat drives, back to school drives, etc.)
- Mass together/retreat/recommitment
- Periodic or Quarterly financial report to pastor/parish

If separately incorporated or directed by Council:

- **Insurance due**
- **Renew corporation status with state**

**Boldface: necessary to maintain legal standing**



# YOUR CALENDAR

- What items do **you** need?
- What do you **not** need?

Try it now



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### 3) DATES WHICH ARE FLEXIBLE

- Review and update your Conference roster in the Members Portal [svdpmembers.com](http://svdpmembers.com)
- Review your Safe Environment training & background check status
- Internal self-audit – see “Conference Audit Manual” and “Conference Audit Worksheets”
- Review of Conference policies and procedures (please see the **Manual**)
- Document/Records retention review (please see the **Manual**)

If doing all five each year is not reasonable,  
try doing half this year and the other half next year.



# TIPS FOR SUCCESS



- Avoid bunching a lot of activities into a single month.
- Make calendar visible and review regularly.
- Delegate, delegate, delegate!
  - Some activities can be owned by another officer.
    - Annual Report preparation, quarterly reports
  - Some activities may already be owned by a committee chair.
    - Fundraisers, annual projects
  - You might want to appoint a new chairperson or committee for some.
    - Safeguarding procedures / new member admission
    - Policy/procedure review and update



# IDEAS FOR DELEGATION

<b>President</b>	Coordinate overall activities of the Conference.
<b>Vice-President(s)</b>	Assume duties of President when President is not available. Can also chair a committee or project.
<b>Secretary</b>	Notify members of meetings, take minutes, and handle correspondence.
<b>Treasurer</b>	Handle conference finances. Work with Secretary on Annual Report.
<b>Spiritual Advisor</b>	Prepare and lead prayer, spiritual reading and reflection at each meeting. Plan retreats etc.
<b>Assistant Secretary</b>	Takes minutes when secretary is unavailable.
<b>Assistant Spiritual Advisor</b>	Lead reflections when Spiritual Advisor is unavailable. Help plan retreats and celebrations.
<b>Assistant Treasurer</b>	Assists treasurer with some portion of bookkeeping and making payments. For instance, if you pay utility bills at a kiosk, perhaps a second person could do that.
<b>Pastoral Council Representative</b>	Represent Conference on the Pastoral Council.
<b>Youth Liaison</b>	Coordinate parish youth activities in support of the Conference, work with Religious Ed staff.
<b>Initial Contact with Friends in Need</b>	Take phone calls, get contact info and the nature of the request. This may be a rotating responsibility.
<b>Home Visit Scheduler</b>	Match up requests with available home visit teams. This may be a rotating responsibility.
<b>Home Visit Captain</b>	Work with new home visitors, set up training, ensure procedures are up-to-date
<b>Food Supply Coordinator</b>	Coordinate food gathering to ensure adequate supplies are on hand.
<b>Food Storage Coordinator</b>	Set up and maintain storage for food in a safe and organized fashion.
<b>Food Bag/Box Committee Chair</b>	Organize people to pack food for delivery to those in need. If you have a walk-in food bank or food pantry, there will be additional roles.
<b>Conference Records Coordinator</b>	Maintains records of people helped.

See “Ideas for Delegation” document for more ideas!



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# DELEGATE, DELEGATE, DELEGATE!

- **Ideas for Delegation:**

What are you already doing?

What would you like to try?

Circle two things you  
would like to try.



# ADDITIONAL USEFUL RESOURCES

Explore the [Leadership Resources](#) webpage - for instance:

- Succession planning under “Basics for Leadership”

Watch a webinar on the [Leadership Training](#) webpage.

Check out the [Advanced Governance Resources](#) webpage.

- [All about bylaws](#)
- [IRS/Tax Information](#)
- [501\(c\)\(3\) Information](#)
- [Annual Report Forms](#)
- [Standards of Excellence](#)
- And more!





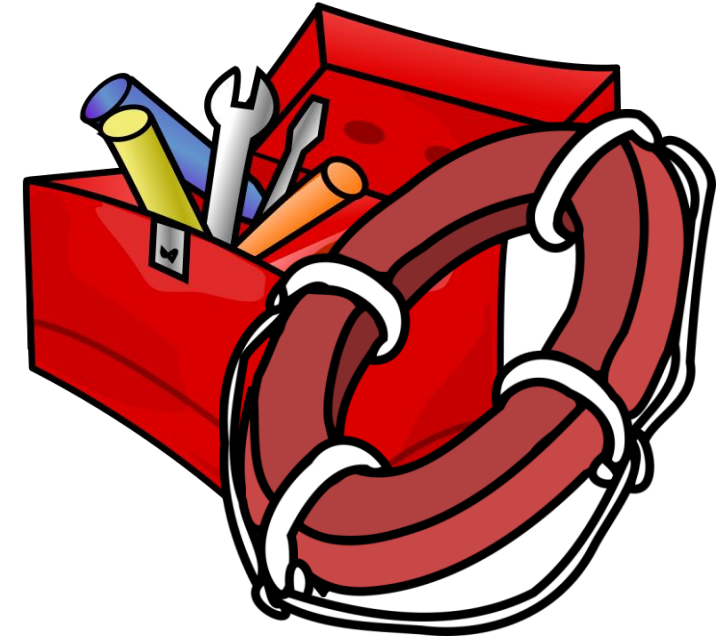
# SURVIVAL KIT REVIEW

Now you've packed your:

- ✓ Resource List
- ✓ Corporate Identity Statement Template
- ✓ Annual Calendar Template
- ✓ Ideas for Delegation
- ✓ Additional Resources

Don't forget your:

- Sense of humor
- Prayer!



Find the templates and these slides here:  
[Leadership Resources](#) page  
in the Conference Presidents accordion





# QUESTIONS?



**Society of St. Vincent de Paul**  
NATIONAL COUNCIL OF THE USA

# CLOSING PRAYER

Mary, Mother of God, whose humble obedience brought Christ forth on earth, pray for us, that we may be God's instruments, serving His poor with humility and gentleness.

**Blessed Mary, pray for us!**

Patroness of the Society of St Vincent de Paul, pray for us, weak Samaritans, that our works may be pleasing to your son, Jesus Christ, whom we seek to serve in the fullness of charity.

**Holy Mary, pray for us!**

Blessed Virgin Mary, who stood at the foot of the cross, pray for all those who are suffering or deprived, that we may seek and find them, that together we may live in the hope of everlasting life.

**Hail Mary, full of grace, the Lord is with thee...**



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