 *The Society of Saint Vincent de Paul*

***National Council of the United States***

***Standards of Excellence Questionnaire for District Councils***

1. How does your Council encourage knowledge and adherence to the Rule?
   1. Provide Members a copy of the Rule and the Manual Yes No
   2. Distribute copies of the Rule at Ozanam Orientation meetings Yes No
   3. Provides workshops for Members on the Rule Yes No

1. Is the Council Incorporated? (If not please explain the reason)
2. Are the Council’s Bylaws up-to-date and in compliance with National’s approved and recommended Bylaws? *(If no, please advise what steps are being taken to comply, and the estimated completion date)*
3. Is your Council under National’s 501 (c) (3) Group Ruling, or your own exemption separate from the Catholic Church?
   1. National’s 501 (c) (3) Group Ruling \_\_\_\_\_\_
   2. We have our own 501 (c) (3) exemption\_\_\_\_\_\_
   3. We are under the exemption of the (Arch) Diocesan Council\_\_\_\_\_\_

*If none of the above applies, please state what steps are being taken to become tax exempt?*

1. What was the date of the Council’s last audit or financial review? What type of an Audit or review was it, and by whom? *If there has been no audit or review within the last 12 months, what steps are being taken to arrange for such an audit and / or review?*
2. As Council President, do you attend National meetings on a regular basis? Should the Council President be a National Council Member, is a proxy provided when unable to attend?
3. Do you as Council President; encourage membership attendance at Regional meetings? Does the Council offer financial support to members unable to attend due to lack of sufficient funds?
4. Has the Council filed the required IRS 990 form for the last fiscal year? If not, what steps are being taken to come into conformity?

9. Annual reports are due each year. What was the submission date of your last report? If unable to meet the prescribed deadline, what was the reason?

1. Does your Council have a Stores operation? And if so, what was the submission date of your last Stores report? If unable to meet the required deadline, what was the reason?
2. National Solidarity Contributions are due no later than November 1st each year. What was the date of your Council’s most recent contribution payment? If past due, what was the reason?
3. What is the date of your Council’s institution? *If your council has not been instituted, what steps are being taken to be instituted? If you do not know the date of institution, have you asked the National Council office for this information?*

13. Does the Council have a record of their conferences that are currently aggregated by International? *If no, what steps are being taken to compile an up-to-date record?*

1. Does your Council use the membership roster of the National Database, or the Council’s own membership roster? If you use your own roster, how is the National Database roster updated? Does the Council maintain the membership roster, or are the conferences responsible for updating their own membership list?
2. What is the meeting frequency of your Council? What is the meeting frequency of Conferences under your jurisdiction?
3. What steps are being taken to ensure that elections both at the Council level and Conference level are being conducted according to the Rule and prescribed Bylaws?
4. Does the Council have an active Spiritual Advisor, and if so, is it a priest, religious, or lay person?
5. How many Ozanam Orientations were held in the last fiscal year? How many attended? How many Ozanam Orientations are planned for this fiscal year?
6. What steps are being taken to ensure that Conferences within your jurisdiction are making regular Home Visits as required?
7. Which Work Plan Items in the National Strategic Plan are being worked on, and how many has your Council completed?
8. A similar evaluation tool is available for Conferences as well. Is this being used by the Council leadership to evaluate their performance?

Standards of Excellence for District Councils

Revised August 18, 2014