



# Management and Accountability Issues for Conferences

John Berry

National Vice President, Southeast



Society of

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

1

## Management and Accountability



Issues of management and accountability are important for all levels of any organization to understand, practice, and monitor. Especially when that organization deals with legal and financial matters.

The Society of St. Vincent de Paul has a complex and multi-layered structure and at each level of that structure there is ongoing management of large sums of money, regulatory and legal matters such as tax-exempt status, and adherence to state and federal law.

If the leadership at all levels of the Society does not understand and monitor these management and accountability issues properly the Society runs the risk of jeopardizing the ability to execute the mission.

We use the term 'Governance' to summarize this responsibility.



Society of

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

2

## OK, So What is Governance and Why Should I Care?



- **Nonprofit governance** simply means how a **nonprofit** is administered. The key players in a **nonprofit** organization may be directors, officers, committees, members, staff and volunteers, and any existing advisory boards or friends' groups.
- In the Society of St. Vincent de Paul these key players are Council/Conference Presidents, Vice Presidents, Treasurers, Secretaries, and Council Board Members. For Councils with paid staff, the CEO/ED is also a key player.
- Mission is what distinguishes nonprofits from their for-profit cousins: Nonprofits have missions instead of owners or shareholders. While the prime directive for key players of for-profit organizations is to ensure the highest possible value for owners, by contrast, a nonprofits prime directive is mission fulfillment.



Society of

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

3

## But We're a Conference, So We Don't Need to Worry about 'Governance', Right?



Well, YES, you do. Management and Accountability are just another way of saying Governance.

While some of the specific principles of good governance may not apply to an individual Conference, the management and accountability issues associated with proper governance do.

Governance is the legal, administrative, and operating practices of an organization which ensure its mission can be accomplished in a way that is effective, impactful, and proper under law; thus protecting stakeholders, donors, and volunteers and ensuring it adheres to federal, state, and local laws and regulations.



Society of

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

4

## But Wait, Why Do We Need Governance When We Have 'The Rule'?



SVdP has **The Rule**, which sets out its vocation, organization and mission. Thus, **The Rule** focuses us **INTERNALLY** to ensure that the Society adheres to its core values and mission.

Proper Governance practices on the other hand, as we mentioned earlier, apply to the operating practices of the organization. The management and accountability issues.

You can think of it this way; your kids Soccer League may have very different rules of play than your Church Bowling League. Those define how they accomplish their mission – soccer or bowling competition. That's like our RULE. But, they also both have to operate under the same legal and regulatory administrative guidelines and laws. That's governance.

## Management and Accountability



- Management and accountability responsibilities don't change from one level of the organization to another.
- They may be administered, monitored, and reported differently, but the overall principles are consistent.
- Good governance, which is good management and accountability understanding and practice, is required for the proper operation of any Council or a Conference.
- It is NEVER a question of WHAT must be done, it is simply a question of HOW it will be done.

# Management and Accountability



- What does fiduciary mean?
  - Fiduciary duty requires Leadership to stay objective, unselfish, responsible, honest, trustworthy, and efficient. Conference Officers, as stewards of public trust, must always act for the good of the Society, rather than for the benefit of themselves. They need to exercise reasonable care in all decision making, without placing the organization under unnecessary risk.

The Three Legal (called Fiduciary) Duties of Nonprofit Management are:

- Care - Each Conference Officer has a legal responsibility to participate actively in making decisions on behalf of the Society and to exercise his or her best judgment while doing so.
- Loyalty - Each Conference Officer must put the interests of the Society before their personal and professional interests when acting on behalf of the Society in a decision-making capacity. The Society's needs come first.
- Obedience – Each Conference Officer bears the legal responsibility of ensuring that the Society complies with the applicable federal, state, and local laws and adheres to its mission.



7

# Management and Accountability



The Three Overarching Practices of Good Governance (at any level) are:

- Establishing Organizational Identity and Direction
- Ensuring Necessary Resources
- Providing Oversight



8

## Establish Organization Identity and Direction



This role – while it seems would be more Council focused – is important for a Conference. Even though The Rule, The National Office, and the (Arch)Diocesan Council establish the larger scope items below, the Conference, under the principle of Subsidiarity, has a very important role in defining how it serves are area in which it operate. These include:

- Determine the Conference's mission and purpose and advocate for them.
- Clarifying the Conference's mission
- Resolving key strategic issues in executing the mission
- Ensure Effective Planning to accomplish the mission

## Mission and Vision



- Do all Conference members share a common understanding of the mission of the Conference?
- Can each Conference Member articulate what the Conference wants to be accomplish? Do they have an idea of the goals to get there?
- Are all policy and strategy discussions and decisions rooted in The Rule, the Mission and Vision? Are they specifically discussed?
- Does the Conference have a process to review and update the mission and are mission related issues discussed?

## Ensure Resources



- Ensure the financial and volunteer resources necessary to support the work of the Conference
- Build a competent leadership team, **establish succession planning**
- Work to build and improve performance in the Conference – ongoing Training!
- Build/Enhance reputation of the organization with key stakeholders (donors and volunteers) and the community (your Parish)



Society of

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

11

## Ensuring Adequate Resources - Fundraising



- Often the Conference's biggest challenge
- "I didn't join this Conference to raise money! I joined to help people"
- There is no "quick fix"
  - Conference needs to have opens discussion and an understanding of why it needs to raise money.
  - Determine who in the Conference have the passion and skills to lead the effort
  - Provide Training if necessary
  - Personal Giving/Black Bag



Society of

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

12

# Provide Oversight



- Monitor programs and services and assess performance
  - Home Visits
  - Thrift Stores
  - Food Pantries
  - Other works
- Protect assets and provide financial oversight and risk management
  - Financial Reporting
  - Following the Treasurer's Manual and financial guidelines
- Ensure legal and ethical integrity
  - Conference Bylaws
  - Annual Reporting
  - IRS Reporting



Society of

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

13

# SUMMARY



- One of the fundamental challenges for Council and Conference Leadership is developing a strong understanding of their roles and responsibilities beyond the basic charitable work we do in the Society.
- Most Councils and Conferences, in general, are doing well with more fundamental responsibilities such as understanding the Society's mission, growing in spirituality, and providing support to people in need.
- However, many struggle most with external responsibilities, including recruitment, fundraising, advocacy, and community-building and outreach. This lack of understanding of what is — and is not — a part of leadership's essential roles can lead to a whole host of dysfunctions, such as membership stagnation, development of 'cliques', rogue decision-making, lack of engagement, and more.
- Since it's impossible to do a job well if you don't know what the job is, all Society leadership must take the time to ensure that every Conference Officer fully understands what's expected and needed of him or her, and then hold each other accountable when they get off track.



Society of

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

14