



The Society of Saint Vincent de Paul
National Council of the United States
Commentary and Notes on the Standards of Excellence
Questionnaire for Conferences

The annual reports and a self-evaluation will be used to review the status of Conference Governance and Operations.

1. The Diocesan Councils (or the District Councils, where no Diocesan Council exists) will have the responsibility of initiating this evaluation process within their respective Council areas.
2. The process will commence with a review of the annual reports for the most recently completed fiscal year. The council will provide the Standards of Excellence for Conferences Questionnaire to each Conference asking them hold a special Conference meeting to do a self-assessment using this questionnaire.
3. The results will be summarized on a reporting sheet and returned to the Council. The reporting sheet summary should be accompanied by a plan of action for the elements which the Conference plans to improve in the coming year, paying special attention to the “Minimum Requirements for Existing Traditional Conferences.”
4. The Council President may appoint a taskforce to assist in reviewing the Conference annual reports, SOE summary assessments & action plans submitted, and determining what Council support will be provided to Conferences.

Questions about required practices

1. Does the Conference meet all the “Minimum Requirements for Existing Traditional Conferences”? (included below)

Commentary:

The following is an expansion of the Minimum Requirements for Existing Traditional Conferences. Existing Traditional Conferences must:

- **Adopt Bylaws within one year.** Three sets of Nationally Approved Bylaws are available: Bylaws for Conferences without a Board of Directors (standard for most Conferences), Bylaws for Conferences with a Separate Board of Directors, and Bylaws for Conferences with an Integrated Board of Directors.

In 2005, the National Council approved seven sets of Bylaws: one set for the National Council, two sets for Conferences, two sets for District Councils and two sets for (Arch)Diocesan Councils. As of the passing of those Bylaws, all Councils and Conferences are required to have a set of Bylaws. In 2018 and 19, all seven sets of Bylaws were updated, reflecting a few changes but mostly for clarity. Two additional sets of Bylaws were created for Councils without Boards of Directors. All Councils and Conferences were asked to upgrade their Bylaws to correspond to the newly updated versions. In addition, if a Conference has a Special Work that is separately incorporated, then it should use the Special Work’s Bylaws for separately incorporated special works approved in August of 2019. In October of 2021, the National Board of Directors approved one additional set of Bylaws for Conferences. There are now 10 sets of Bylaws: one set for the National Council, three sets for Conferences, three sets for District Councils and three sets for (Arch)Diocesan Councils.

- **Review the following** “Minimum Requirements for Existing Traditional Conferences” **and develop a plan** to correct areas in which the conference is not meeting the requirements of the Rule.

1.1 The Conference excludes no one from membership based on age, sex, race, or ethnic background. (Rule, Part I, 3.2)

The Rule, Part I, Article 3.2 states: *The Society, in each of its Conferences (the primary basic unit of the Society of St. Vincent de Paul), makes no distinction regarding gender, wealth, occupation, social status or ethnic origin.*

Commentary:

We draw our members from all walks of life. Regardless of their ethnicity, gender or social status, all members are equal in the eyes of the Society.

You will find that occasionally this will cause a conflict within the Conference since there are times when the Conference chooses to not accept someone into the Conference.

Normally there are reasons and concerns that override the distinction identified above. The decision to not include an individual must be made for reasons not directly related to what's stated in the Rule. For example, a person may be turned down as an Active (Full) Member because they are not Catholic. This fact would not prevent them from being an Associate Member. Another example, someone who had been convicted as a sex offender may be turned down because of diocesan Safe Environment regulations.

1.2 The Conference meets regularly and frequently, and not less often than twice a month. Weekly meetings are desirable. (Rule, Part I, 3.3.1, Part III, Statute 5)

The Rule, Part I, Article 3.3.1 states: *The Conferences meet regularly and consistently, usually weekly, but at least every fortnight.*

Commentary:

This Article is very clear except for *fortnight* (14 days). In the United States we interpret this to mean at least twice a month. Weekly, every other week (bi-weekly), and twice a month (semi-monthly) are acceptable meeting frequencies.

The Rule, Part III, Statute 5 states: *Members of the Society, traditionally gather in communities called "Conferences," which meet weekly, or at least twice a month. This is to affirm the importance of the spiritual and social dimensions of Vincentians coming together as a community of faith and love, prayer, and action.*

Commentary:

Weekly (or twice a month at a minimum) meetings has been promoted by the Society for many years. It is now a requirement within the Rule. It is primarily within the meeting of the Conference that the three essential elements of the Society come together: growth in holiness, community (fellowship), and service.

1.3 The Conference has four or more active members and a full slate of officers: President, Vice President, Secretary, and Treasurer. (Rule, Part III, Statute 12)

The Rule, Part III, Statute 12 states: *For a specific period of time the Society chooses qualified members for the various Council and Conference leadership positions who will carry out their tasks with the same dedication with which they work within their own Conference.*

After nominations have been declared for any elected position, canvassing on behalf of a candidate or against any candidate is forbidden.

It is important that officers at all levels participate regularly in meetings and charitable activities of the Society and visit the poor as often as possible.

President: The election of Conference and Council Presidents is held by secret ballot in accordance with an approved set of procedures (by the local Council) that are consistent with the Rule and Statutes and Bylaws of the Society.

The term of office of a Conference, District or (Arch)Diocesan Council President is three years, once renewable; for Youth Conferences the term is one year, once renewable. Once a President has served for two consecutive three-year terms, that person will not be eligible for re-election as President until a three-year term has elapsed under a different President.

The term of office of the National President is six years, not renewable. The President is elected by secret ballot in accordance with the National Council Bylaws.

Officers: Each Conference or Council should have at least a Vice President, who exercises all the functions of the President when the latter is absent, a Secretary and a Treasurer all of whom are

appointed by the President after consultation with the members. The President may appoint other officers.

All officers named by the President serve at the pleasure of the President. Such appointments terminate automatically when a new President takes office. An incoming President may reappoint an officer or officers and others who served under the previous President. To safeguard the good reputation of the Conference or Council and therefore, that of the Society itself, appointees must not be related to the person empowered to make the appointments. In no event should any one person hold more than one officer position in the same Society entity at the same time.

Commentary:

Just a few notes:

1. *The election... held by secret ballot.* This is in the Rule; the election process is clearly defined in a document on the National website: Election Process – Conference.”
2. Officers consist of, at least, a Vice President, Secretary and Treasurer. Some Conferences try to get by with fewer officers. In order to officially exist, the Council or Conference must have a full slate of officers and no individual member should hold more than one officer role.
3. The appointments are made *after consultation with the members*. Servant leadership puts the decision making in the hands of the members.
4. *An incoming President may reappoint an officer or officers and others who served under the previous President.* This means officers other than the President may serve for life.
5. *Appointees must not be relatives of the person empowered to make the appointments.* This part of the Rule has been violated by numerous Conferences. There are solid reasons to ensure the Rule is followed.
6. The officers’ term of office ends when a new President takes office. This is important to understand. When a President resigns, the other officers still hold their offices until the new President takes office. This way the Conference is not lacking in leadership and can still function properly.

1.4 Prayer, spiritual readings, and reflection are a part of each meeting. (Rule, Part III, Statute 7)

The Rule, Part III, Statute 7 states: A Conference meeting shall incorporate Spirituality, Friendship, Service, and our Cultural Beliefs and could include the following components:

1. *A punctual call to order*
2. *Roll call*
3. *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)*
4. *Spiritual reading (or meditation, address) on which members are always invited to comment as a means of sharing their faith*
5. *Approval of Minutes of previous meeting*
6. *Home visitation reports*
7. *President's report*
8. *Secretary's report (including correspondence received, information about the Society or training points)*
9. *Treasurer's report*
10. *A review of one or more parts of The Rule*
11. *Committee reports (including Formation Committee report)*
12. *Membership reports*
13. *Resolutions*

14. *Special Works reports*
15. *Old business*
16. *New business*
17. *Time and Place of next meeting (the calendar should include Festival meetings and Conference Liturgies)*
18. *Secret collection*
19. *Closing prayer*
20. *Adjournment*

Commentary:

The Rule does not call for two “gatherings” at a minimum per month. It calls for two “meetings.” The items listed in this statute identify what makes up a Conference meeting. There should be no question about what counts as a Conference meeting. Having two meetings (one spiritual and one business) does not count. Another important aspect of the meeting is that all members are expected to attend. A Conference quorum must be met for the meeting to be valid. Having a meeting in which only the officers gather does not count as an official Conference meeting. Attending one Conference meeting and one District Council meeting does not count.

1.5 The Conference has an active, trained Spiritual Advisor who attends full meetings regularly, and accepts responsibility to promote the spiritual life of the Conference. (Rule, Part I, 3.13, Part III, Statute 15, U.S. Manual, Pages 48-49)

The Rule, Part I, Article 3.13 states: *Members of the Society are united in the same spirit of poverty and sharing. They encourage one another to live a profound spiritual life and spirit of prayer. For this purpose, the role of Spiritual Advisor is very important.*

Commentary:

It is essential that every Conference have an “active” Spiritual Advisor. The Spiritual Advisor’s role is to animate, encourage and promote the spiritual growth of each member. The Spiritual Advisor must provide a spiritual reading for each meeting, facilitate a discussion of that reading (not a homily or sermon), and attend the remainder of each meeting advising the members as necessary in their decision making about who we are and what we are about. The Spiritual Advisor encourages each member to grow spiritually with the opportunities that are presented through the Society and/or their parish: retreats, days of recollection, rosaries, scripture studies, adoration of the Blessed Sacrament, daily Mass, daily prayer and more. Because our primary goal as a Vincentian is to grow in holiness, to grow closer to God, it is important that we regularly place this in the forefront of all our activities.

The Rule, Part III, Statute 15 states: *Since the beginning of the Society, a Spiritual Advisor has been appointed to help foster spiritual life within the Conferences and Councils under the guidance of the Holy Spirit and in conformity with the Rule and Statutes of the Society.*

Should a member of the ordained clergy, namely a priest or a deacon, not be available to act as the Spiritual Advisor, the President of the Council or Conference may appoint a Catholic layperson who has had training consistent with the policies of the National Council regarding the formation and training of Spiritual Advisors. At the Conference and Council levels appropriate church protocol should be observed when appointing ordained or non-ordained Spiritual Advisors. Priests and deacons are not eligible to be elected or appointed in the Society to any office outside their spiritual role.

If a parish priest who has declined to be the usual Spiritual Advisor does occasionally attend a Conference meeting, he will always be invited by the President to contribute to the sharing during the

Spiritual Reflection.

Commentary:

One of the things that is made explicitly clear here in this statute is that if a layperson is chosen to be the Spiritual Advisor, that person must be Catholic. You can refer back to Part I of the Rule, Article 6.5 (Preserving the Catholic credo and ethos) where it states explicitly: “The Catholic beliefs and ethos of the Society of St. Vincent de Paul must be preserved. The President, Vice-President and Spiritual Advisor should, therefore, be Roman Catholic.” It does not happen very often, but there have been times when this has been violated and needed to be rectified as soon as possible.

The National Council has published a Spiritual Advisors Handbook which describes the role and responsibilities of the Spiritual Advisor. It also describes what the qualities are of a Spiritual Advisor and what type of background one should have. Experience has shown that the growth of members, the Conference and the Council are very dependent on the influence of the Spiritual Advisor. That is why so much emphasis is placed on each Conference and Council having an active, qualified Spiritual Advisor.

On Pages 48 and 49 in the Manual, it states: *Council and Conference leadership must select a person who is both willing and able to devote the necessary time and energy to the role of Spiritual Advisor. Spiritual Advisors are indeed full Council/Conference members, but they do not serve as officers; if ordained, they do not vote. Often a Catholic lay member of the Society of St. Vincent de Paul will be chosen, though an ordained priest or deacon, vowed religious, or parish pastoral staff may fill this role. Within the first Conference of Charity, the Catholic layman Emmanuel Bailly assumed responsibility for the spiritual health of the Conference and its young members and serves as a model for today’s Spiritual Advisor.*

The Spiritual Advisor’s task is that of spiritual animator. The Spiritual Advisor enables members to better understand the meaning of charity and its practical application toward those in need and assists with the development of their Vincentian Spiritual Life.

Spiritual Advisors play an important role in promoting the work of the Society. In keeping with changing times and needs, they provide inspiration and challenge for the adoption of new works. The Spiritual Advisor attends the meetings, participates in the discussions, and provides guidance to the Council or Conference membership on spiritual matters. As circumstances permit, Spiritual Advisors actively participate with other members in direct service to the needy.

1.6 The Conference is aggregated or has filed an application if it has been in existence for one year or more. (Rule, Part I, 3.8, Part III, Statute 6)

The Rule, Part I, Article 3.8 states: *The visible unifying link within the Society is Aggregation of the Conferences and the Institution of the Councils declared by the Council General.*

Commentary:

You are not truly a member of the Society of St. Vincent de Paul until you belong to a Conference and/or Council formally recognized as such by our Council General (the international level of our Society). This is accomplished by a process of **aggregation** for Conferences and **institution** for Councils. Although the process is simple, the procedure does change on occasion. Details about this process can be acquired from our National Council Office.

The Rule, Part III, Statute 6 states: *All Conferences and Councils are full members of the Society when they are respectively Aggregated or Instituted by the Council General.*

All Conferences seeking Aggregation and Councils seeking Institution are required to follow the procedures established by the National Council at the time of application. The National Council complies with the appropriate criteria of the Council General International.

Commentary:

At the time of the writing of this document, the application process for Aggregation consists of filling out a two-page document and having appropriate signatures from Conference, District Council, Diocesan Council and National Council Presidents before being forwarded to Paris to the Council General. The Certificate of Aggregation comes by the reverse path. This process may take as long as six months to complete, since the Council General International reviews applications twice annually. It is at the time the document is signed in Paris that the Conference is officially recognized as part of the Society.

1.7 The Conference serves all those in need regardless of age, sex, race, ethnic background, or lifestyle. (Rule, Part I, 1.4 Part III, Statute 8)

The Rule, Part I, Article 1.4 states: *The Society serves those in need regardless of creed, ethnic or social background, health, gender, or political opinions.*

Commentary:

Anyone calling on us is eligible for our service. We must be sensitive to their needs. We should have at least a limited understanding of cultural differences. Most members understand this. However, there is a growing tendency among Conferences to not go into certain parts of town or certain apartment complexes for fear of physical harm. We never want to place our members in harm's way. However, we should never allow where a person lives to prevent us from listening to their story or providing them with assistance. Under these circumstances, we should do what is necessary to meet people in a place that is safe; but, also, a place that those we serve can easily get to. We should be serving them by going to them — they should not be serving us by coming to us. Keep in mind that when we are doing calls with a partner (the Vincentian way), the risk is reduced.

The Rule, Part III, Statute 8 states: *Services are provided regardless of race, creed, color, gender, sexual orientation, criminal justice status, disability, marital status, veteran status, national origin, age, or physical handicap.*

Commentary:

We do have members who would say “no” to those who come to us simply on one or more of the conditions stated in the paragraph. And they will come up with a thousand reasons to justify it. It is considered a form of discrimination to serve only people with children, telling singles they will have to go elsewhere. It is a form of discrimination to not pay the rent of an unmarried couple or of a couple of the same sex. It is a form of discrimination to not assist someone with a criminal record. The point is that we simply don't discriminate. We are to find the face of Christ in those we serve, and He has many faces.

1.8 All Home Visits and other interviews are made by two Vincentians. (Rule, Part III, Statute 8)

The Rule, Part III, Statute 8 states: *Visits to those in need should be made in their environment. This contact with friends in need should always be made in a spirit of friendship, respect, cordiality, empathy, and affection. It should also promote self- sufficiency whenever possible for those who suffer and show concern for their deepest needs.*

Services are provided regardless of race, creed, color, gender, sexual orientation, criminal justice status, disability, marital status, veteran status, national origin, age, or physical handicap. Home visits always are made in pairs.

Commentary:

Home visits always are made in pairs. Two-by-two – this is what our Lord promoted among His disciples – need we say more. The two-by-two rule should not be limited to home visits. It is highly recommended for every encounter with those in need, regardless of where or what the service is that is being provided. Some have recommended that a third Vincentian might be used where safety is a consideration.

On Page 23 in the Manual, it states: *Vincentians always visit in pairs. This practice emphasizes the Conference’s status as a community, not a collection of individuals who “do their own thing.” The visiting team is ideally composed of Vincentians of both genders, various age groups, and different life experiences, so that a better perspective of the needy person’s situation can be gained, and various courses of action explored. From the beginning, Vincentian visitation to the needy was done in pairs for the protection both of the needy person and the members. The precedent was set by Christ Himself, when He sent out the Apostles two by two. The Society wisely continues this tradition in the interest of safety, liability, and propriety.*

Commentary:

In this litigious society, it is also important to understand that liability insurance protection that is recommended to all Conferences and Councils will be ineffective if it is shown that Vincentians were negligent or not in compliance with our rules, principles, and practices. By going on visits alone rather than in pairs, Vincentians may be jeopardizing the status of the Society both locally and at a higher level.

1.9 The Conference has person-to-person contacts with the needy. (Rule, Part I, 1.2, Identity Statement)

The Rule, Part I, Article 1.2 states: *The vocation of the Society’s members, who are called Vincentians, is to follow Christ through service to those in need and so bear witness to His compassionate and liberating love. Members show their commitment through person-to-person contact. Vincentians serve in hope.*

Commentary:

*...person-to-person contact...*One of the things we must be sure of is that our members are called to personal action. We are called to directly perform our works of charity, of love, to those in need. Person-to-person contact is necessary for this ministry to be valid. We are not to pay people to do our works of charity for us. We are not to give our funds to other charitable organizations no matter how much good they do. Person-to-person contact is the Vincentian way.

The Identity Statement of the National Council states: *“Inspired by Gospel values, the Society of St. Vincent de Paul, a Catholic lay organization, leads women and men to join together to grow spiritually by offering person-to-person service to the needy and suffering in the tradition of its founder, Frédéric Ozanam, and patron, Vincent de Paul. As a reflection of the whole family of God, members, who are known as Vincentians, are drawn from every ethnic and cultural background, age group, and economic level.*

Vincentians are united in an international society of charity by their spirit of poverty, humility and sharing, which is nourished by prayer and reflection, mutually supportive gatherings, and adherence to a basic Rule. Organized locally, Vincentians witness God’s love by embracing all works of charity

and justice. The Society collaborates with other people of good will in relieving need and addressing its causes, making no distinction in those served, because in them Vincentians see the face of Christ.”

1.10 Home visits are the primary focus of work for traditional Conferences. (U.S. Manual, Page 23)

On Page 23 in the Manual, it states: *From the Society’s beginning, the central and most basic activity of Conferences has been the visitation of the needy in their homes. This is the clearest symbol of our Vincentian charism, which dictates the highest respect for the dignity of the poor. It symbolizes our Vincentian commitment to reach out to the needy, rather than require them to report to an outside service site. In the home, needy persons feel most free to confide their stories of struggle. In that family setting, Vincentians are asked to listen, offer humble advice, and render assistance.*

In the modern world, there are certain situations when a home visit is not possible or advisable – for example, those involving homelessness, battering, or safety. Nevertheless, Vincentians should never excuse themselves lightly or regularly from the tradition of home visitation. Even when assistance is given in an emergency from the parish or other service site, Vincentians should follow up with a home visit.

Commentary:

Home visitation has always been the primary method of encountering those in need by members of the Society. *Visits to those in need should be made in their environment.* It is emphasized here in the Rule, Part III, Statute 8. The statute does not indicate (and the Society has never said) that home visits are the only way to encounter those in need. It has, however, through its leadership, going back to Frederic Ozanam, emphasized repeatedly that home visitation is the best way to encounter our friends in need. This method eliminates many of the problems associated with asking the poor to come to us or meeting them in neutral territory. St. Vincent de Paul told us: “the poor are our masters; we are their servants.” The servants go to the master, not vice versa.

1.11 The Conference maintains a bank account separate from the parish, under the control of the Conference Treasurer. (Rule, Part III, Statutes 12 and 24, U.S. Manual, Pages 26 and 30)

Refer to 1.3 above for Statute 12.

The Rule, Part III, Statute 24 states: *Conferences and Councils zealously manage and maintain the Society’s assets. The authority to manage the Society’s assets remains exclusively with Councils that may delegate this authority in accordance with the Rule of the Society and the Bylaws and Resolutions of the National Council.*

Faithful to the spirit of non-accumulation of wealth the next higher Council may determine annually the percentage of the funds of each Council or Conference within their area that may be made available to them. The next higher Council will work with the Conference or Council to determine an appropriate reserve for unanticipated events and direct the allocation of funds which exceed the anticipated demands, which may not be hoarded as a capital sum, to the service of the poor in their own area or abroad in the poorest areas of the world.

In the event of the dissolution of a Conference or Council, all debts and liabilities legally incurred by and on behalf of the Conference or Council shall be fully discharged by the next higher Council of the Society. Remaining money or property and all files and documents must be passed promptly to the

next higher Council that is in compliance with the requirements of the Internal Revenue Service and is in good standing with the National Council.

Commentary:

The key point to get from both Statutes 12 and 24 is that the Society's Councils and Conferences must zealously manage and maintain the Society's assets. This is primarily the role of the Treasurer.

On Page 26 in the Manual, it states: *Society funds are to be maintained by the Conference, not by the parish. The Conference must have a separate checking account, and it does not require the signature of the pastor. Society funds must not be comingled with parish or individual accounts.*

On Page 30 in the Manual, it states: *The Society ... must meet the legal, reporting, and financial obligations required of all non-profit, tax-exempt organizations...Conferences must know the federal and state tax laws that apply to them...and assiduously meet these obligations...Strict adherence to all regulations governing recordkeeping and corporate procedures (including regular audits) helps protect the public, the Society, and Vincentian members against deceit and misuse of funds...Good recordkeeping is an essential part of Vincentian activity.*

Commentary:

Society leaders and members are fully responsible for all the Society's assets. Those assets must be held separate from the assets of any other person or from the parish. There should be no comingling of funds. There should be no signors on the accounts who are outside of the Society or who are in ordained ministry (priest or deacon).

1.12 The Conference has 501(c)(3) tax exemption, either on its own or through its Council; files a 990 annually, or provides the input required for the Council's 990. (Bylaws Document 1, Article 2)

Bylaws Document 1, Article 2 states: *In the event the Conference shall ever use the Employer Identification Number (EIN) of a District or Archdiocesan/Diocesan Council, herein after referred to as an Upper Council, it must coordinate its tax-exempt status with that Upper Council, and it will not have a separate legal existence but will operate under that Upper Council.*

In the event the Conference uses its own EIN, it must ensure that the Conference timely fulfills the requirements for tax-exempt status under Internal Revenue Code section 501(c)(3) and is properly organized as an unincorporated association under state law. The Conference will also be responsible for continuing to maintain its ongoing legal compliance and reporting with the state, the IRS, and as a group of members subject to the Rule of the Society.

Commentary:

It is necessary for all St. Vincent de Paul entities to have and maintain their tax-exempt status. Regardless of whether it is owned by the Conference or its Council, the Conference must do its part to ensure that it is doing whatever is necessary to maintain the tax-exempt status. This is essential to being able to get donations in order to serve those in need.

1.13 The Conference attends District meetings and takes part in programs and events sponsored by their District/Diocesan Councils. (Rule, Part I 3.6, U.S. Manual, Page 36)

The Rule, Part I, Article 3.6 states: *Conferences are grouped under various levels of Councils.*

Councils exist to serve all the Conferences they coordinate. They help the Conferences to develop their spiritual life, to intensify their service and to diversify their activities so that they may be responsive to the needs of those who suffer.

Councils at appropriate levels are particularly called to create new Conferences, to help existing Conferences to expand, to promote Special Works, to prepare training courses and encourage Vincentians to attend them, to foster interest in cooperation with the Vincentian Family, to promote cooperation with other organizations and Institutions, to develop friendship between members in the same area, to provide communication to and from Conferences and higher Councils. In summary, to promote the sense of belonging to a Society which encircles the world.

Commentary:

The title for section 3 of this part of the *RULE* is significant. It's titled "Members, Conferences, Councils ...". It was titled that way purposely. In reading through the *RULE*, this current version, and all prior versions, in reading through the manuals of the Society printed over the last 170 plus years, one thing becomes very clear. The Society of St.

Vincent de Paul is about the members of the Society. Its purpose is for member growth – in holiness, in fellowship and in service. It then focuses on the Conference as a gathering of members – a community of faith – where member growth is promoted and enhanced.

Now we look at Councils and once again the focus is on the member and the Conference. In fact, in reading the *RULE* and its prior versions one finds that the primary purpose for the existence of a Council is to promote and enhance the growth of the members and the Conferences. *Councils exist to serve all the Conferences they coordinate.* Reading the above, we find a summary of the ways in which Councils achieve this primary goal: bringing in new members, starting new Conferences, training members, promoting friendship and community, enhancing communication.

As a general concept, there are four levels of Councils in the Society.

1. The first is the District Council which encompasses a local geographic area which includes multiple Conferences.
2. The second is the Diocesan Council which covers an area equivalent to the geographic boundaries of the Catholic Diocese in which it exists. The Diocesan Council consists of multiple District Councils. An Archdiocesan Council corresponds to the boundaries of the Catholic Archdiocese. In our structure this is equivalent to a Diocesan Council and has multiple District Councils.
3. Third is the National Council. In the United States, this Council is responsible for all St. Vincent de Paul entities within the geographic boundaries of the U.S.
4. And fourth is the Council General International headquartered in Paris, France. This is responsible for all Society activity throughout the world.

The Conferences are expected to fully participate in the meetings and activities of their District Council and are encouraged to participate as fully as possible in the higher Councils of the Society.

On Page 36 in the Manual, it states: ***Rather than conduct business by mail, phone, or web, Vincentians hold meetings to take advantage of the creative interaction and synergy that can occur in a group. Meetings harness the collective knowledge, experience, and wisdom of the members to create solutions that might elude the individual. When members have taken ownership of them, Council decisions can be implemented more effectively.***

1.14 The Conference sends its members to formation and training sessions offered by the Society, particularly the Ozanam Orientation. (Rule, Part I, 3.6, 3.12, Part III, Statute 10)

The Rule, Part I, Article 3.6 is shown above in the previous segment. Here is The Rule, Part I, Article 3.12:

It is essential that the Society continually promote the formation and training of its members and Officers, in order to deepen their knowledge of the Society and their spirituality, improve the sensitivity, quality and efficiency of their service to the poor and help them be aware of the benefits, resources and opportunities that are available for the poor. The Society also offers members higher training in order to better help to raise the cultural and social level of those who request support.

Commentary:

Formation has always been an important part of our Vincentian vocation and ministry. It has been, however, truly emphasized worldwide over the last several years. As part of our National Strategic Plan, the Society has initiated the *Serving in Hope* program, the *Invitation for Renewal* leadership retreat, the standardized *Ozanam Orientation*, the weekly *Spiritual Reflections*, the *Vincentian Pathway* and is continually looking for more ways to help form our Vincentians. The Society has also created teams of formators in each region to help in this formation process.

This does not diminish in any way the informal training that is done “on the job.” Each Conference goes through an informal process of helping new members become familiar with doing home visits, working in the pantry, filling out paperwork, finding resources, interviewing, etc. This is the day-to-day training that is necessary for our work in ministry.

The Rule, Part III, Statute 10 states: ***Councils are at the service of all Conferences under their jurisdiction. They help Conferences develop their spiritual life, promote friendship among members, intensify the service of the group, and diversify their activities so that they will be constantly attentive to the needs of those who suffer. (See Rule, Part I, 3.6)***

Commentary:

This portion of Statute 10 emphasizes that the Councils are at the service of their Conferences. Formation and training is an important aspect of that service.

Is there a requirement to attend an Ozanam Orientation within a certain time frame to be considered an active member?

The following is an excerpt from Resolution 93 which was approved by the National Council on September 2, 2011.

“Therefore be it resolved that the National Board of Directors recommends that the National Council require that:

- ***All new active members must attend Ozanam Orientation within one year.***
- ***All existing members of the Society should be required by their Councils to attend an Ozanam Orientation in order to reacquaint themselves with the “spirituality and heritage” of the Society and prepare themselves to enter the “Vincentian Pathway” process.***
- ***The Ozanam Orientation should be taken before taking office, for all Council and Conference officers and Spiritual Advisors, but must be taken within one year after taking office. All Executive Directors are required to take the Ozanam Orientation within one year of being hired.***
- ***The effective date for this resolution is January 1, 2012.”***

1.15 The Conference submits Annual Reports to the District/Diocesan Council. (Rule, Part III, Statutes 22 and 23)

The Rule, Part III, Statute 22 states: *Periodically, but not less frequently than once every three years, each Conference and Council must evaluate their service to the members, to the poor, the effectiveness of their special works, and all activities and explore ways to provide better service. They should also consider new types of needs they may seek to alleviate and how to find those who are in need.*

Commentary:

The self-evaluation process is something that should take place annually; however, few Conferences go through this process at regular intervals. A Conference or Council that does not do this type of evaluation tends to become stagnant and members also stop growing.

The Rule, Part III, Statute 23 states: *Each Conference and Council must, at all times maintain accurate records and submit an annual report to the next higher council on forms provided by the National Office.*

The Society preserves its good reputation for honesty and responsible stewardship. It produces finance reports that include revenue, expenses, assets, and activity reports, at least annually. Each Council and Conference shall conduct an annual audit of such type as is required.

These reports are published internally and externally and are made available to all members and the public in general. The reports are sent to the (Arch)Diocesan Bishops, federal, state, and local officials for their information.

The annual report of the National Council should also be sent to the Council General.

Commentary:

Good record keeping and annual reports are all part of good stewardship. We owe this to our donors and, also, to the poor on whose behalf we use the resources we are given.

Information from the annual reports should also be given to the pastor and/or the parish council. By publishing summary information in the parish bulletin, the parish becomes aware of Conference activities; and experience shows that more parish support is gained from this effort.

1.16 The Conference maintains regular communication with its Pastor and parishioners on its service and activities, including an annual report, preferably through the parish bulletin. (Rule, Part III, Statutes 22 and 23, U.S. Manual, Page 30)

For Statutes 22 and 23 refer to the previous segment above.

In reference to page 30 of the Manual: *We live today in a time of increasing scrutiny. With our Councils and Conferences serving millions throughout the United States, it is imperative that we demonstrate good stewardship by providing accurate, timely information to our Church, our donors, and the general public.*

Commentary:

The primary donor base for our Conferences is the parish and its parishioners. It is essential that we keep them informed of our activities so that they will continue to support us. Conferences should provide to their pastor and their parishioners a summary of their activity annually (at a minimum). Quarterly is the preference in this since it is normally at least four times a year that Vincentians seek support from their parish. The more our donors know about our activities, the more they will support us with dollars, other resources, and members.

1.17 The Conference maintains a positive relationship with the clergy. (Rule, Part I, 5.1)

The Rule, Part I, Article 5.1 states: *Faithful to the clear intentions of Blessed Frederic Ozanam and his companions, the Society has a close relationship with the hierarchy of the Catholic Church. Respect of the members for the hierarchy provides the foundation for harmonious reciprocal cooperation.*

Commentary:

The Council General communicates regularly with the Pope and with other members of the Church Hierarchy in Rome. It is with deep respect that we maintain this regular communication and work toward cooperation in the goals of the Society as well as those of the Church.

Likewise, our Diocesan and District Councils maintain a regular communication with the local ordinary. We seek our Bishop's support as well as that of his staff at the diocese. We send annual reports to the Bishop describing our activity and we seek his direct support in promoting the Society in the Diocese.

At the local level, Vincentians keep in touch with their pastor, associates, and the parish council. Building of this relationship helps ensure the life of the Conference in the parish.

1.18 All donations go to the works of the Society to maintain Society structure, both nationally and internationally. No donations are used to fund other charities no matter how worthy. (Rule Part I, 3.14, Part III, Statute 26)

The Rule, Part I, Article 3.14 states: *Vincentians should never forget that giving love, talents and time is more important than giving money.*

Nevertheless, the Society uses money and property to help relieve the suffering of those in need. The Society's funds must be handled with the utmost care, prudence, and generosity. Money must not be hoarded. Decisions regarding the use of money and property are to be made after reflection in the light of the Gospel and Vincentian principles. Accurate records must be kept of all money received or spent. The Society may not allot funds to other organizations, except occasionally for other branches of the Vincentian Family, save under exceptional circumstances.

Commentary:

Proper use of our funds and other property always seems to be a hot topic among our Conferences – how much should we spend on behalf of a person or family in need, should we make them come up with part of it, should we set a limit or give the same for everyone, can we give some of our funds to this needy but worthwhile organization, etc.? Remember that we are stewards of resources intended to be used for the poor. Our decisions on the use of those resources should be intended to better serve the persons in need rather than to serve the Conference or its checking account. No decision should be made on behalf of building up resources rather than helping someone in need. Today is the rainy day. We need to serve the person before us and not worry about who might come to us for help tomorrow. Use what we have today. God will provide for tomorrow.

The Rule, Part III, Statute 26 states: *The funds of the Society shall be used for the works of the Society, including Vincentian twinning and collaboration in payments for people we serve. However, no matter how worthy the cause, funds shall not be diverted in the form of donations or contributions to other organizations or charities, except, occasionally, for other branches of the Vincentian Family. The Treasurer is charged as the responsible officer to ensure adherence after consultation with the Conference or Council.*

Donations and gifts by donors for a certain purpose can only be applied for that same purpose and

all reasonable steps will be taken to respect the wishes of donors.

Commentary:

No matter how worthy the organization we are not permitted to give our funds as a donation to their operation. There are times, however, when a Conference will work with another organization (such as the Salvation Army or the Community Action Agency) and make a co-payment on behalf of someone we are serving. This payment, although made out to the other organization, is not considered a donation since it is a pass through on behalf of an individual or family. It is not a donation to their operation.

**1.19 The Conference provides required support (solidarity dues) for Councils/Region.
(Rule Part III, Statute 25)**

The Rule, Part III, Statute 25 states: *In the United States, a variety of means exist to ensure the proper collections for the poor and to maintain the Society's structure, nationally and internationally, such as special collections, solidarity contributions, fundraisers, twinning, and special works. All collections are conducted in the spirit of friendship, solidarity, and sharing.*

Commentary:

The primary purpose for the existence of Councils is to serve the Conferences. In order to serve the Conferences, the conferences must contribute to funds and activities of the Council. It should never be forgotten that the primary beneficiary of Council activity is the Conference. Reminders of this should be regularly given at Council Meetings. Many of our Councils have defined a solidarity contribution to be made by their Conferences. Councils and Conferences make an annual solidarity contribution to the National Council which includes support for the National Council, Council General International, and the Regions.

1.20 The Conference actively recruits new members such as by utilizing the Invitation to Serve materials. (U.S. Manual, Page 28)

The U.S. Manual, page 28 states: *The Conference as a whole, and members individually, should encourage recruitment of new Active (Full), Associate, and Contributing members. Participation in special parish days to acquaint parishioners with parish organizations can be effective, with literature and photographs used to showcase the work of the Society and the Conference's various projects. One-on-one personal recruitment works best.*

Conferences and Councils should take advantage of the effective recruitment model Invitation to Serve, available from the National Council of the United States.

Commentary:

The Conference must continually strive to bring new members into the Society to help the Society grow, to bring new and fresh ideas, to give others an opportunity to grow in holiness through our ministry, and to serve those in need. As the Manual states, personal invitation is the best recruitment method; but it is not the only method. But in any case, recruitment must entail telling a truthful story about this ministry. It is a ministry of love, compassion, and spiritual growth.

**1.21 The Conference President has served no more than two consecutive 3-year terms.
(Rule, Part III, Statute 12)**

The Rule, Part III, Statute 12 was presented in 1.3 above.

Commentary:

Experience has proven that the leadership of the Conference must change in order to give other members of the Conference an opportunity to serve. The President cannot serve more than six years consecutively. The President must then step down and is not eligible to be a candidate for President until at least 3 years have passed. The Active Members in the Conference must come forward to run for office.

1.22 The Conference upholds the spirit of non-accumulation of wealth. (Rule, Part I, 3.14 and Bylaws Document 1, Article 16)

The Rule, Part I, Article 3.14 was presented in R above.

Bylaws Document 1, Article 16 states: *“Faithful to the spirit of non-accumulation of wealth and in accord with Part I of the Rule, 3.14, the Conference shall use good stewardship in maintaining the Society’s assets. The Society uses money and property to help relieve the suffering of those in need and these funds must be handled with the utmost care, prudence, and generosity.”*

Commentary:

Members must accept the fact that our donors have given the Conference resources to use to help those in need. Except for legitimate Conference expenses, the resources are intended to be used and not stashed away in bank accounts or storage. The Conference is charged with serving those in need – not accumulation of wealth. If, at any point in time, the Conference decides to keep money in the bank rather than help someone in need, then this is called hoarding and is prohibited by the Society. Our funds must be used for the purpose they were, given and received.

1.23 The Conference conducts an annual audit or financial review, whichever is appropriate. (Rule, Part III, Statute 23 and Bylaws Document 1, Articles 12 and 16)

The Rule, Part III, Statute 23 was presented in 1.16 above.

Bylaws Document 1, Article 12 states: *“The governance and power of the Conference shall be vested in its President and the Conference Active Members. Their Governance responsibilities include but are not limited to electing the Conference President; approving the annual budget; approving Presidential appointments; compiling a timely annual report; reviewing and evaluating the finances of the Conference and its annual audit; from time to time responding to requests or directives from higher Councils and reviewing and evaluating the leadership, mission and planning of the Conference.”*

Bylaws Document 1, Article 16 states: *“The Conference will undertake an annual internal audit and report the results to the District Council, or next higher or Upper Council.”*

Commentary:

Every Conference and Council are required by the Rule and Bylaws to have or perform an annual audit. For most Conferences, this can be an informal process performed by members of the Conference. The process is defined by the National Council. The Conference audit manual and worksheets can be found on the National website. For Conferences that have a complex operation which includes stores and

special works, a formal audit by a CPA may be required.

1.24 The Conference knows and follows the Rule of the Society. (U.S. Manual, Page 14)

On Page 14 in the Manual, it states: *The Rule applies to every member of the Society. The International Council General's position on compliance with the Rule is as follows: "Our Society is a free and fraternal association. No one can be compelled to remain in it against one's will. Therefore, a member, Council, or Conference choosing to belong to the Society must be in accord with the Rule in every respect, in particular to:*

- *Give evidence of spiritual and moral adhesion to the mission, vision, and values of our Vincentian vocation.*
- *Attend the meetings of the Society.*
- *Produce regular reports on the various activities.*
- *Contribute, in a spirit of solidarity, to the expenses of the next higher Council which, in turn, will fulfill its duties."*

On Page 16 in the Manual, it states: *Bylaws are significant written rules by which an organization is governed. Bylaws determine how the Society of St. Vincent de Paul is structured and, along with state law, determine the rights of participants in the structure.*

At the National Meeting in Chicago, September 2005, the Board of Trustees approved Bylaws for Conferences, District and (Arch)Diocesan Councils, and the National Council. Membership in the National Council of the United States, Society of St. Vincent de Paul, Inc. requires that every organizational unit (Conference and Council) have Bylaws.

Commentary:

Every Conference must have a set of Bylaws that complies with the Rule and the Nationally Approved Bylaws. In addition to the Rule and Bylaws, the National Council approves various resolutions that affect policy and operations within the Society. Occasionally those resolutions affect how Conferences operate. It is essential that Conferences keep their members informed on these matters and ensure that members comply with all requirements (SVdP or legal).

2. What percent of Conference members have attended Ozanam Orientation? What is the plan for those who have not?

National Resolution 93 is presented in 1.14. above.

Commentary:

National Council Resolution 93 placed an obligation on all members of the Society to attend an Ozanam Orientation. This obligation was effective January 1, 2012. All new Active Members of the Society are required to attend an Ozanam Orientation within one year of joining the Society. All Councils were asked to ensure that older members also attend as soon as possible. Those older Active Members, who are taking on an Officer role and have not yet attended an Ozanam Orientation, would have up to one year after taking office to attend.

So, this boils down to an obligation for all Active Members to attend an Ozanam Orientation. In addition,

resolution 93 places an obligation on the District/Diocesan Councils to provide the Ozanam Orientation as often as necessary during the year to accommodate its members. Originally developed as an in-person training session, the Ozanam Orientation is also available to be presented in webinar format.

3. What formation/training have Conference Officers and Spiritual Advisor attended?

Commentary:

Through a wide variety of sources which includes the National Council and District/Diocesan Councils throughout the United States, various programs have been developed to train Officers in their various roles as well as Spiritual Advisors. There is no formal list of everything that is available; but a search among the Councils in your region will likely locate training sessions that have already been developed. In addition to the traditional in-person training sessions, many of these are available in webinar form. Many of the National webinars have been recorded; the recordings are listed on the National website; the weekly E-Gazette lists many of the recordings and promotes the upcoming webinars. It is up to the Councils to make these training sessions available to their members.

4. In what ways does the Conference encourage the Spiritual Growth of the members?

Commentary:

The current version of the Manual is 102 pages in length. Of the 102 pages, at least 50 pages (48 through 97) are devoted to spirituality. Within those 50 pages, the manual makes reference to Spiritual Advisors, essential elements, mission, vision, values, call to holiness, Vincentian ministry, Vincentian vocation, loyalty to the church, Vincentian spirituality, references to sacred scripture, devotion to Mary, Vincentian prayers, and Vincentian Saints and Blesseds. In addition, there are sporadic references to spirituality throughout the rest of the Manual. References to spirituality are made throughout the Rule as well. It is clear spirituality is considered a vital and essential element of our Society.

Within the Conference meeting, there are three specific points in time where spirituality plays a major role: opening prayers, spiritual reading and discussion, and the closing prayers. In a typical one-hour meeting, 15-20 minutes should be devoted to this.

Besides the meeting, there are other opportunities that may be available: praying before and after visiting with those in need, praying with the people we serve, daily Mass, daily rosaries, scripture studies, holy hours, days of recollection, retreats, adoration of the Blessed Sacrament, etc. The list can go on. The bottom line is that the number of ways that a Conference can encourage the spiritual growth of its members is only limited by imagination.

5. How does the Conference encourage knowledge of the Rule and adherence to it?

1.24 above goes into detail related to this.

6. Has the Conference adopted set of standard Bylaws that conform to those most recently approved by the National Council (April 2019)? *Attach a copy of your current bylaws*

On page 16 of the Manual, it states: *Bylaws are significant written rules by which an organization is governed. Bylaws determine how the Society of St. Vincent de Paul is structured and, along with state law, determine the rights of participants in the structure.*

At the National Meeting in Chicago, September 2005, the Board of Trustees approved Bylaws for Conferences, District and Archdiocesan/Diocesan Councils, and the National Council. Membership in the National Council of the United States, Society of St. Vincent de Paul, Inc. requires that every organizational unit (Conference and Council) have Bylaws.

The Rule is the paramount authority of the Society of St. Vincent de Paul. Should any bylaw, rule, or regulation adopted by a Conference or Council conflict with the Rule and regulations of the Society of St. Vincent de Paul as now promulgated or hereafter adopted by the International Council General or the National Council of the United States, such bylaw, rule, or regulation shall be void and of no effect.

To remain in good standing, Conferences and Councils must maintain their Bylaws (including any and all amended articles) in updated and amended form. The Conference or Council must keep a copy of their Bylaws together with the document of the Rule.

On page 30 of the Manual, it states: *The Society of St. Vincent de Paul must meet the legal, reporting, and financial obligations required of all nonprofit, tax-exempt organizations. Since these obligations are subject to change and may vary widely from the federal to the state level, from state to state, and even from state to locality, Conferences should consult the National Office for the latest federal requirements and a local attorney for the state and local requirements.*

To protect the Society in the civil arena, Conferences must know the federal and state tax laws that apply to them, have capable local counsel to determine what their obligations are, and assiduously meet these obligations. Under certain conditions, charitable agencies and organizations are required to file IRS Form 990. Many U.S. Councils do so. Penalties for noncompliance are cumulative and can be severe.

The American Institute of Certified Public Accountants (AICPA) has prepared statements of accounting principles and reporting practices for nonprofit organizations. Failure to adopt recommended methods could jeopardize community support, foundation grants, and eligibility for publicly funded programs.

For the Society to maintain good standing before the law and in the eyes of the Church, our donors, and the general public, Conferences must keep adequate records and reports. Proper recordkeeping begins at the Conference level with the Conference treasurer, who must maintain accurate records of all financial transactions. A Conference checking account separate from the individual's own account, and from any parish or other organization's account, is essential. There can be no commingling of funds.

Officers or leaders of voluntary organizations must conform to all procedural requirements of state corporate law, as well as their own charters and Bylaws. Strict adherence to all regulations governing recordkeeping and corporate procedures (including regular audits) helps protect the public, the Society, and Vincentian members against deceit and misuse of funds.

On pages 39 and 40 of the Manual, it states: *The Society of St. Vincent de Paul must meet the legal, reporting, and financial obligations required of all nonprofit, tax-exempt organizations. Since these obligations are subject to change and may vary widely from the federal to the state level, from state to state, and even from state to locality, Councils should consult the National Office for the latest federal requirements and a local attorney for the state and local requirements.*

Official recognition of a Council as a member of the Society of St. Vincent de Paul requires the affirmative action of the Council General, the international governing body of the Society. Application forms for the institution of Councils may be obtained from the National Office of the Council of the United States. Completed applications are transmitted through all ascending levels of

the Society.

A District Council applying for “institution” (official status) sends its application to the Archdiocesan/Diocesan Council to which it is attached. The Archdiocesan/Diocesan Council, having approved, transmits the petition to the National Council, which conveys it to the Council General for final action. Word of the Council General’s action is conveyed to the applicant via the descending chain of communication.

If no Archdiocesan/Diocesan Council exists, a new District Council should seek the approval of a prior-existing, instituted District Council. Until an Archdiocesan/Diocesan Council is formed, the first instituted District Council represents the diocese to the National Council and qualifies as a National Council Member. Three or more District Councils should form an Archdiocesan/Diocesan Council to better serve all the Conference members of the diocese.

Generally speaking, charitable groups may act as unincorporated associations, formally organized corporations, or charitable trusts. The corporate form is preferred for its convenience, familiarity of structure, and liability limitations.

Councils should incorporate and comply with the laws of their state. The National Office can offer advice on how to proceed. An incorporated Council should check periodically to confirm that its Articles of Incorporation and Bylaws are properly recorded and available to succeeding Council leaders (“Statements of Continued Existence” may also be required in some states). Failure to properly maintain the necessary records can jeopardize the tax deductibility of donor gifts and result in revocation of the Society’s 501c3 tax-exempt status.

Insurance guidelines for Conferences, Stores, and Councils are posted in the members section of the national website. As these guidelines recommend, Councils should contact qualified professionals for advice on coverage for all aspects of a not-for-profit organization and reevaluate their policies yearly.

Commentary:

As stated above, all Conferences and Councils of the Society are required to have Bylaws. The National Council approved nine versions of Bylaws for Conferences and Councils: three for Conferences, three for District Councils and three for Archdiocesan/Diocesan Councils. Most Councils and Conferences can operate using those models. Since the model Bylaws have all the required legal wording and compliance with the Rule, structure and governance of the Society, most Conferences and Councils can simply adopt an appropriate version without alteration and operate with them.

The Society understands that there are some unique circumstances that require the writing of unique Bylaws. However, there is still the requirement that all of the proper legal wording be included. In addition, the Bylaws must comply with the Rule, structure and governance defined by Society. All the non-standard Bylaws must be reviewed and approved by the appropriate authority. All Bylaws must be approved by the next higher Council: Conference Bylaws by the District, District Council Bylaws by Archdiocesan/Diocesan Council or the Regional Vice President if no Archdiocesan/Diocesan Council exists, and Archdiocesan/Diocesan Council Bylaws by the Regional Vice President.

Bylaws of Isolated Conferences must be approved by the Regional Vice President. Bylaws must be reviewed and updated on a regular basis. The Nationally Approved Bylaws have been updated multiple times since approved: for IRS required wording and for clarity. All Councils and Conferences must ensure that their Bylaws are current with all legal requirements. In some cases, states require organizations to submit updates to their registered Bylaws annually.

7. Is your Conference under your Council’s 501(c)(3) IRS recognition, or your own exemption separate from the Catholic Church?

- a. Council's 501(c)(3) recognition ____
- b. We have our own 501(c)(3) exemption ____
- c. Please enter the date your 501(c)(3) exemption was issued _____ and attach a copy of the IRS letter of recognition

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

The Rule, Part I, Article 5.2 states: *The Society is legally autonomous as to its existence, constitution, organization, rules, activities, and internal government. Vincentians freely choose their own officers and manage the Society's activities and assets with full autonomy, in accordance with their own Statutes and the legislation in effect in each country.*

Commentary:

The Society works in cooperation with the Church but is not controlled by the Church.

The Rule, Part II, Statutes 1.6 and 1.7 emphasize that the legal requirements of every country in which St. Vincent de Paul is present must be honored. The Councils and Conferences of the Society have an obligation from good stewardship to fulfill all that is legally required of Society entities.

Refer to Page 30 of the Manual.

All St. Vincent de Paul Councils and Conferences must maintain their 501(c)(3) tax-exempt status from the IRS. This status must be separate from the Catholic Church. The tax-exempt status may be acquired either directly from IRS by filing a Form 1023 or it may be acquired by joining a Council's Group Tax-Exemption. District Councils and Conferences that are part of a/n (Arch)Diocesan Council may alternatively have their tax-exempt status through their (Arch)Diocesan Council, if the (Arch)Diocesan Council permits this relationship to occur.

If the Conference uses its own tax-exemption, the President and other members of the Conference should have access to the letter issued by IRS authorizing the 501(c)(3) status of the Conference. This letter must be passed from one Conference Secretary to another so that each Conference Officer and member has access to this information.

8. Is the financial activity of the Conference included in a 990 that it files annually with the IRS or that a Council includes in its 990?

Commentary:

Every Conference or Council which has its own tax-exemption must file a 990. If a Conference is separately incorporated and received its own tax-exemption from the IRS, it is required to file a form 990 each year. If the Conference is using its Council's tax-exemption, its annual report numbers are to be included with the Council's 990.

9. When was the last Conference audit or financial review (whichever is appropriate) completed? Who performed it? What was the scope of the audit or financial review?

Commentary:

See 1.23 above for an explanation of this.

Questions about standard operating procedures and practices

1. How does the Conference encourage attendance at District/Diocesan Council Meetings/Training/Social Events?

Commentary:

As shown above in the minimum requirements for Conferences, members are expected to participate in the activities of the higher levels of the Society. This includes District Council meetings, Diocesan Council meetings, training sessions and social events. The Society is more than a local parish Conference; it exists at district, diocesan, regional, national, and international levels.

As an example, District Council meetings are open meetings – open to all Vincentians. Although voting is restricted to Conference Presidents or their designated proxies, all members are welcome to attend. The matters before the District Council are such that they may have an impact on all Conferences within the District. So, active participation by all members would be beneficial.

As with the District Council meetings, Diocesan Council meetings are open to all Vincentians. And for the same reasons as stated above, all members should be encouraged to attend.

Formation of our members is essential. Diocesan and District Councils present various training sessions. Ozanam Orientation is the standard for member formation. However, many Councils present other training sessions that are of real value to members: how to fill out paperwork, how to do a home visit, preparing annual reports, what is expected of a Conference President, etc. Members are expected to attend all appropriate training sessions. As indicated in 1.M. above, the Ozanam Orientation is now a required training program.

The second essential objective of the Society is fellowship or community. Most Council's hold social events for members and it is important for our members to get together to grow in fellowship. Many of these events are tied specifically to opportunities for spiritual growth as well. Some are done as fund raisers – some as events of appreciation. All members should be encouraged to participate. Sometimes, incentives are used to influence members to attend.

There is an old saying, "If you feed them, they will come." A free meal is always a big draw. Some Councils offer a financial incentive to the Conference that has the most attendees.

2. What means does the Conference use to raise funds?

The Rule, Part III, Statute 25 states: *In the United States, a variety of means exist to ensure the proper collections for the poor and to maintain the Society's structure, nationally and internationally, such as special collections, solidarity contributions, fundraisers, twinning, and special works. All collections are conducted in the spirit of friendship, solidarity, and sharing.*

There are some primary sources of funds that Conferences normally take advantage of:

- a) Parish collections: these are done either sporadically or regularly. The most common are the Fifth Sunday Collection, special seasonal collections, monthly or quarterly collections (basket or parish

- envelopes), poor box, or an allocation from the parish funds.
- b) Solidarity contributions: the secret collection during Conference meetings and any other collection from the members.
 - c) Fundraisers: many Conferences do special fundraisers throughout the year. For example, they might be a fundraising breakfast or dinner inviting the parish, raffles, working a vending area at a sports event, and applying for grants.
 - d) Twinning: receiving funds from other SVdP Councils and Conferences.
 - e) Stores and other special works: stores, pantries, meal programs, Christmas Angel Tree, Back-to-School or other special programs for which the Conference solicits funds. Stores are not as common at the Conference level because they require a lot of resources to operate; however, they are an excellent source of income if managed properly and if sound business practices are followed.
- The list is not limited to what is shown above. St. Vincent de Paul once said that Vincentians are creative to infinity.

3. Has the Conference established its own internal guidelines for helping people? What are they?

In the Manual on page 27, it states: *One of the greatest strengths of the Conference is its flexibility. Members who personally encounter the needy individual or family are assumed to have a special insight into the best way to give help. Neither race, creed, church attendance, life style, nor income should automatically qualify or disqualify anyone for assistance.*

Whenever it can, a Conference should address a crisis quickly. Lack of food is one of the most urgent needs that come to the Conference's attention. However, the Conference chooses to deal with such emergencies — with food given in kind, a voucher or gift certificate to a supermarket — the dignity and confidentiality of the needy person should be protected.

Some persons may seek greater financial assistance from the Conference, such as payment of rent or utility bills. Conferences should always have personal contact with such applicants, even when Conference funds cannot cover the full amount. Conferences can partner with other Conferences, other organizations, or the needy persons themselves to provide a portion of what is needed.

It is important not to create dependencies in the people we help. Vincentians need to consider each situation they encounter on its own merits, carefully crafting with the persons in need a resolution to their most pressing problems. Members of the Society understand that people can change self-defeating patterns in their lives when they are encouraged to believe in themselves. Vincentian support frequently takes the form of encouragement and realistic planning, building upon the strengths we find in the struggling individual or family.

Commentary:

The manual "Vincentian Life: Conference" published by the National Council gives some good advice about setting up Conference guidelines. Conference members need to know generally how the conference wants to handle those who call upon it for help. Everyone should be involved in those decisions since we are a democratic Society. A new conference may have to go through such a discussion a couple times in its first year, as it adjusts and matches its goals to its financial resources.

Be careful not to be too restrictive in setting conference standards. For example, some conferences have a "rule" to give food no more than once in a month to any client. What about special situations? A few conferences have set a rule that they never help with rent. What about the case where a family has been able to come up with \$400 of \$450 needed and only needs help with the \$50 difference? Based on that "rule," a home visit team may never even hear the appeal for help.

Every time a conference sets a "rule" rather than a guideline, it risks experiencing a situation where it will turn Christ (in the person of the poor) away at the door without even listening or trying to help. Set a guideline instead of a "rule," allowing for special circumstances. Consider every case on its own merit.

Even well-established conferences should occasionally revisit the guidelines it has set regarding food, shelter, utilities, clothing, medical help, transportation, and furniture.

Guidelines are dependent on the number of conference members and the conference's resources (income) -- which change over time. What is important is for members to agree that, while guidelines are used on a day-to-day basis by the home visit team for the average call, nothing should be set in concrete. Leeway on a case-by-case basis should always be given to the home visit team if there are special or unusual conditions.

4. Does the Conference review at least annually its spiritual growth, friendship, and services to determine how they can better meet the needs of those they serve and help Vincentians grow in spirituality and friendship?

In Bylaws Document 1, Article 12, under Governance Responsibilities, it is stated that Conferences should *“from time to time respond to requests or directives from higher Councils, and review and evaluate the leadership, mission and planning of the Conference.”*

Commentary:

Instead of “from time to time,” it is recommended that this review process take place at least once each year. A good time to do this is in the first couple of months in the fiscal year. It is the beginning of a new cycle and in many cases, the beginning of the term of a new Conference President and Officers. Self-evaluation of the Conference operations, its mission, and works is always a good thing. There should never be a prior commitment to change, but a willingness to change where the need exists.

One resource that can help with this is the annual Conference audit. This is both an operational review and financial review. On the National website is a copy of the Conference Audit Manual and the Conference Audit Worksheets. This is explained further in 1.23 above.

5. Is the Conference twinning? How and where?

The Rule, Part I, Article 4.1 states: *Conferences and Councils help others in need, both at the national and international level. This is one of the activities most cherished by the Society. The awareness of acute poverty in a great number of countries and the Vincentian preferential option for the poor spurs Conferences and Councils to assist others with less resources or in particular situations. This direct link between two Conferences or Councils, consisting of sharing prayer, a profound friendship and material resources, is called twinning. This activity contributes to world peace and to understanding and cultural exchange among peoples.*

Commentary:

Twinning is done by Councils and Conferences both domestically and internationally. All international twinning is coordinated through the National Council office. Domestic twinning is handled informally between U.S. Councils and Conferences involved.

6. What is the Conference plan for obtaining new members? How many new members have you added in the past year?

In the Manual on page 28, it states: *The Conference as a whole, and members individually, should encourage recruitment of new Active (Full), Associate, and Contributing members. Participation in special parish days to acquaint parishioners with parish organizations can be effective, with literature and photographs used to showcase the work of the Society and the Conference's various projects. One-on-one personal recruitment works best. Conferences and Councils should take advantage of the effective recruitment model Invitation to Serve, available from the National Council of the United States.*

The local Conference must maintain a welcoming environment, so that men and women of all ages and backgrounds can work together and share their Christian values. Conference members also listen with sensitivity to generations and cultures poorly represented in its ranks to find out why they are not attracted to our ministry. Are members a joyful people whose demeanor in service would attract others? The future of the Society lies with each and every Vincentian. Actively inviting others to join is as important as the service rendered to the needy.

M. Pierre Chouard, International President of the Society from 1955-1967, posed this sobering question: "If Frederic Ozanam a twenty-year-old college student and founder of the Society of St. Vincent de Paul in 1833, were a college student today with the same soul, the same spirit, the same attraction to sanctity, the same tenderness to the distressed, the same understanding of the world today, would he become a member of one or another St. Vincent de Paul Conference? To tell the truth, who would dare to reply always in the affirmative?"

Commentary:

On the National Council website, in the SVdP Members section, you will find the document "Invitation to Serve." This document is an excellent resource for building and executing a plan to recruit new members for the Conference and members for a new Conference. The program described has a proven positive track record for Conferences all over the country.

The most successful and meaningful way to recruit is the personal invitation by a member to someone he/she knows. This has proven to be the method that would bring in the most successful and dedicated members. However, this method does not bring in large quantities of members since not all existing members are willing to do the invitation.

Another common method of recruitment is through the Parish Ministry Fair. This is where all the various ministries in the parish have a booth in the parish hall and parishioners are invited to investigate the ministries and see where their interest lies. Typically, this method may draw one or two people to the Society.

7. How does the Conference communicate with parishioners/community?

Commentary:

1.15 above identifies what the Rule says related to annual reporting and sharing information about what we do with our parishioners. The parish is the primary support structure for the Conference and maintaining good communications with the parish community should be one of the essential goals of every Conference. The main method for communicating with the parish is through the parish bulletin. In some cases, members of the Society are given opportunities to speak to the parish from the pulpit. These

rare opportunities are usually associated with recruitment of members or a collection for the Conference.

8. What special programs does the Conference have to help people in need?

Commentary:

Referring to number 10 above again, our services to the people we serve are only limited by our imagination. Many of our Conferences have special works or programs that they operate to further assist those in need. Some of these are: Back-to-School programs, Christmas Adopt-A-Family programs, meal programs, special homeless services, thrift stores, winter shelter programs, water collection/ distribution during summer heat, blanket/coat collection/ distribution during the winter cold, etc.

9. How does the Conference make use of District/Diocesan Council Programs to assist people?

In the Manual on page 36 it states: *Councils undertake charitable works and special projects that exceed the jurisdiction or capacity of an individual Conference. The particular nature of a Council's special works is influenced by the community's socio-economic needs, the Council's resources, and the zeal, enterprise, talents, and influence of local Vincentians. Special works include thrift stores, dining rooms, food pantries, meals on wheels, free pharmacies, homeless shelters, transitional housing, summer camps for kids, indigent burial, budget and tax counseling, employment services, job training, assistance for the disabled, crime victim support, jail/prison ministry and post-release services, medical and dental clinics, eldercare, and family resource centers.*

Commentary:

Conference members are expected to refer people in need to the appropriate special works operated by their Council. The Council's special works should be included in the resource and referral list each Conference has. In addition, Conference members are also expected to help operate those works wherever possible. Some works require Conference member involvement, such as filling out applications or vouchers.

10. Does the Conference protect those we serve as vulnerable citizens with safeguarding policies and practices at a minimum in alignment with Council, Diocesan and Parish requirements for volunteers?

National Resolution 91 states: *"A Resolution to Approve the Society of St. Vincent de Paul Position Statement on Safe Environment Policy for Children and Young People
Whereas the Society of St. Vincent de Paul reaffirms our adherence to the United States Conference of Catholic Bishops' Charter for the Protection of Children and Young People (2002), and
Whereas we reaffirm the need for the care and protection of all children and young people, therefore be it
Resolved That, it is the obligation of all Vincentians to comply with the requirements of the program to protect children in their (Arch)Diocese and it is the responsibility of (Arch)Diocesan Council Presidents, District Council Presidents and Conference Presidents to ensure that compliance."*

National Resolution 189 states: *"WHEREAS our faith and our Rule call us to keep a preferential option for the poor, including our service to our neighbors in need with full dignity; and*

WHEREAS our Society’s members conduct many of their works in parish properties already subject to local Diocesan policies and procedures designed to maintain the safety of everyone serving and being served; and

WHEREAS our members are already subject to local laws and regulations requiring the safety and protection of those serving and those being served; and

WHEREAS the International Council General of the Society of St. Vincent de Paul has created a safeguarding policy and has advanced to all National Councils a SSVP Safeguarding Framework, with direction to all member Councils to create suitable Safeguarding policies in accord with Church and government requirements and in alignment with the international policy;

BE IT THEREFORE RESOLVED that the National Council Board of Directors recommend to the National Council the adoption of a National Safeguarding Policy; and

BE IT FURTHER RESOLVED that the recommendation includes a policy to be evaluated and amended as necessary in accord with local Diocesan and government policies for the protection of everyone to be served by the Society as well as for its members and others serving on behalf of the Society; and

BE IT FURTHER RESOLVED that any adopted national and local policies be reviewed by the National Council and each local SVDP Council at least every five years from the date of initial adoption.”

Questions about recommended best practices

1. How does the Conference make use of the “Serving in Hope” formation program?

In the Preface of Module I of Serving in Hope, it states: *Serving in Hope is a video-assisted resource for the spiritual formation of the members of the Society of St. Vincent de Paul. The goal of the series is to root all members of the Society in the spirituality and heritage of its founder, Blessed Frederic Ozanam, and patron, St. Vincent de Paul.*

Commentary:

The Serving in Hope program consists of seven formation guides and seven videos. The program was designed to be one of the primary modes of member formation within the Society. The topics covered by the seven books are:

- Our Vincentian Vocation
- Our Vincentian Spirituality
- Our Vincentian Heritage
- Our Vincentian Mission
- Our Vincentian Rule
- Our Vincentian Conference
- Our Vincentian Home Visit

The videos that come with the books are effectively three-minute snapshots related to each of the modules within the books. The expected use of the books/videos is during the spirituality portion of the meeting.

The way the program is designed to be used is for reading, reflection, and discussion. Members of the Conference first view the three-minute video. Then, multiple members of the Conference read the

selected material, followed by a dialogue related to the discussion question presented. There are two reading and discussion segments for each meeting. In addition, each of the modules within the books is followed by some enrichment reading for members to do at home. Each member is expected to have his/her own workbook.

The topics covered in this series are a composite of the essential formation issues for all Vincentians. There is enough material for presentation at more than 40 meetings.

2. How many members have attended a Regional/National Meeting? Does the Conference provide funds to cover the cost of member's attendance, or take advantage of Council or National scholarships?

In the National Council Bylaws, it states in Article 13: The annual meeting of the National Council shall be a face-to-face meeting, shall be held upon such date and at such place as may be designated by the President or by a committee appointed by the President for such purpose. The Secretary shall notify National Council members in writing of the time and place of the meeting at least 45 days prior to the annual meeting.

The National Council may hold a midyear meeting which, at the discretion of the President, may be conducted face to face or electronically and be held at such time and place as the President or a committee appointed by the President for the purpose may designate. The Secretary shall notify National Councilmembers in writing of the time and place of the meeting at least 45 days prior to this meeting.

Special meetings of the National Council, which may be conducted face to face or electronically, may be called at any time and place, as follows:

- *By the President, upon 20 days' notice;*
- *By one-third of the National Council members, upon 20 days' notice. Notices may be given by mail, fax, or email.*

Commentary:

The Society is more than a local parish Conference; it exists at district, diocesan, regional, national, and international levels. The National Council is divided into eight regions and each region has an annual meeting. The National Council also holds an annual meeting known as the National Assembly. During those meetings, there are many opportunities for members to attend workshops, committee meetings and various other activities which can develop our members' spirituality, fellowship, and service. Although these typically require travel and hotel accommodations, all members are encouraged to attend these meetings.

If a member belongs to a committee, task force or is otherwise expected to be in attendance, then the home Council/Conference is expected to pay the expenses for that member to attend.

3. How many members serve as Officers or Committee Members for the District/Diocesan Council?

Refer to 1.3 above to read the Rule, Part III, Statute 12 which gives information about Officers.

In the Bylaws for (Arch)Diocesan Councils, it states the following in Article 24: If the Corporation deems it necessary and appropriate, one or more Standing Committees or Ad Hoc Committees can be formed and/or disbanded as the need arises. The Corporation delegates to its Board of Directors the

power to establish the charges for such committees through Board resolutions.

Chairs

Standing Committee

A Standing Committee Chair is appointed by the President of the Corporation and can serve on the Board or an Auxiliary Board if appropriate as a representative of that Committee.

Chairpersons of Standing Committees, after consultation with the President, may appoint other committee members and entrust them with special responsibilities, either as members, advisors or staff to a Committee.

Sub-Committee

A Standing Committee Chair shall appoint all Sub-committee Chairs after consultation with the President. Sub-committee Chair, after consultation with the Standing Committee Chair, appoints members and entrusts them with special responsibilities either as members, advisors or staff to a Sub-committee.

Ad Hoc Committee

An Ad Hoc committee may be established for a specific charge and term. It is approved by the Board and its Chair is appointed by the President. Members are appointed by the Chair following agreement by the President and/or Board.

Term Limits

All appointments by a chair terminate automatically when a new Corporation President takes office. Chairpersons and members may however be reappointed.

Quorum

A simple majority constitutes a quorum for Committee meetings.

Voting

All Committee and Sub Committee members, except those who are paid (or non-paid) staff of the Corporation and except for ordained clergy, shall have one vote. All decisions require a simple majority for approval. A Standing Committee or Ad Hoc Committee Chair reports to the President or Board on decisions, recommendations, and comments agreed to by the Committee. A Sub Committee Chair reports to the Standing Committee Chair or Standing Committee on decisions, recommendations, and comments agreed to by the Sub Committee.

*The final approval relevant to any issues rests with the Board of Directors. Meeting Procedures
The committee or Sub-Committee shall define the frequency of meetings and meeting procedures.
Meetings can be conducted in person, by conference call or electronically.*

Establish and Dissolve Committees or Sub-committees.

Standing Committees are formed by the Corporation and only the Corporation can dissolve a Standing Committee. The Corporation President after consultation with the Board of Directors or the Board acting on its own may form or dissolve Ad Hoc Committees.

Commentary:

Once again, emphasizing the importance of member participation in the larger Society, it is also important to remember that the Society is a volunteer driven organization. All important decisions are made by volunteers – not paid staff. That’s why it is necessary for members to offer their services as

officers and as chairs or members of committees. We all have talents and experiences that can be used to help the Society grow and aid those in need.

When it comes to the roles of officers, any Active (Full) Member may be an officer, except paid staff or ordained ministers (deacons and priests). The President has a limited term; but because new Presidents may appoint a previous officer to continue, the other officers may, in fact, serve for life.

Two books are available that describe the role and responsibilities of Presidents: one is the “Conference President” and the other is the “Council President.” The role and responsibilities of the other officers are described briefly in the Nationally Approved Bylaws for Conferences and Councils.

4. Does the Conference have a file/list of local resources for the members to share with friends in need? Do you regularly meet with community agencies to learn about their services and seek opportunities for collaboration?

In the Manual, on pages 24 through 26, you will find the following services that Conferences typically offer:

A. Poverty Services

- *Limited material or financial assistance for short-term or continuing needs.*
- *Emergency aid, combined with referral to an appropriate public agency when eligible for continuing assistance.*
- *Referral to an appropriate counseling agency when recurrent financial problems indicate a need for professional guidance.*
- *“Filling the gaps” in services provided by the local community, such as help with finding employment or housing.*
- *Self-help programs such as food and repair co-ops, credit unions, home services for the aged and infirm, housing rehabilitation, legal services, and adult education. These can alleviate the need for recurrent handouts, which can undermine human dignity.*
- *Development of inexpensive recreational programs for the economically disadvantaged, such as arranging for the use of local facilities, for a nominal fee, by low-income families, senior citizens, and other special groups.*
- *Development of low-cost professional and household services for needy families. Volunteers are recruited from such professions as plumbing, carpentry, nursing, law, medicine, etc.*
- *Domestic twinning: sharing of the membership and material resources of a more fortunate Conference with a needier one locally.*

B. Information and Referral Services

- *Providing information about services related to poverty, medical-emotional needs, family and personal problems, youth counseling and youth activity programs, senior citizens programs and facilities, etc.*
- *Advocacy on behalf of persons being denied services to which they appear to be entitled.*
- *Conducting or sponsoring educational programs to acquaint parishioners with community welfare and counseling programs.*

C. Services for Emergencies and Special Needs

- *Temporary homemaker service. All families face a crisis occasionally -- through illness, hospitalization, death, etc. -- and can use help with child care, meal preparation, and basic housekeeping until the crisis subsides. If the need exceeds parish capabilities, referral should be made to appropriate community homemaker agencies.*

- *Transportation. Because the elderly are often dependent upon others for shopping, attending church, and visiting doctors' offices and clinics, escort services and transportation are necessary components of any reasonably adequate program of home care.*
 - *Person-to-person sharing of expertise -- in budgeting, nutrition, housekeeping, application for employment, child care, home maintenance, etc. Such service may also be offered as special parish educational programs or group classes.*
 - *Youth services. Addressing the cultural, social, spiritual, and recreational interests of young people, these services rely heavily upon youth initiative and decision-making but also offer opportunity, counsel, and support.*
- D. Services to the Lonely and Alienated**
- *Conference members visit lonely or alienated individuals in institutional and medical facilities. Sickness, drug addiction, and mental illness may underlie their problems and special needs. As lay volunteers, Conference members become involved only after consulting with the appropriate facility staff.*
 - *Conference members visit crime victims, and men and women who are incarcerated or on probation or parole. Continuing contact with the families of inmates may be helpful. Intelligent involvement requires consultation and collaboration with criminal justice officials.*
 - *Regular visits to patients in hospitals, nursing homes, and homes for the aged help keep them alert and engaged.*
 - *Regular visits to the homebound sick or aged reassure them that someone cares and is nearby in time of need.*
 - *Home care services, which enable persons to keep living at home, may include the following:*
 1. *Preparation and delivery of meals*
 2. *Providing opportunities for leisure by "relieving" family members caring for an aged relative*
 3. *Home maintenance (e.g., chores and minor repairs)*
 4. *Tele-care (checking in by phone to converse and make sure needs are met)*
 5. *Transportation to stores, doctors' offices, church, etc.*
 6. *Recreational services (activity and companionship in the home, or at a center to which the older person is transported)*
 7. *Special personal services provided by volunteers (barbers, beauticians, etc.)*
 - *Recruitment of seniors to help provide social services to various agencies. Many retired persons have abilities and experience ideal for helping our brothers and sisters in need. Volunteering can give them a renewed sense of personal wellbeing and worth.*
- E. Services to Promote Social Justice**
- *Every Vincentian needs to understand the Society's priorities and motivation in advocating for the poor. Voice of the Poor, the National Committee of the Society, upholds Catholic Social teaching by researching, validating, documenting, advocating, and promulgating issues related to the condition of the poor and disenfranchised.*
 - *At the parish level, social justice can be promoted by publicizing the problems of the poor, providing a forum to discuss poverty issues and society's proper response to them, and seeking to inform and influence public opinion.*
 - *At the local, state, and federal levels, promotion of social justice requires advocacy, and the establishment and operation of programs, benefits, and services that address the root causes of want and encourage respect for human life and dignity.*

Commentary:

From this list, it seems like the Conference should be able to do everything for everybody. But that is not the reality. Simply reading the list is exhausting. The list is a composite of things being done throughout

the country by SVdP Conferences. But not every Conference does everything or is even capable of doing everything. So, it is important that each Conference be aware of other organizations, agencies, resources within their area that provide services which the Conference cannot (or should not). There are services that we should not provide if they are being sufficiently provided by others. Each Conference should research their surroundings, find out what others are doing, and develop a resource list that they can pass on to those who come to us for help.

We should be mindful of one caution: The purpose of the resource list is not to alleviate the work we do among those in need. We are not to become a simple referral organization. The resource list must be looked upon as a supplement to what we do for those in need.

The Rule, Part I, Article 7.9 states: *The Society should work not only with individuals in need but also with families and communities. It can help an excluded or deprived local community to develop a sense of responsibility and solidarity which leads it to improve its economic, social, or environmental well-being, always retaining the personal contact of members with those who suffer.*

Commentary:

In order to have a meaningful resource list, members should also seek out local businesses that would be willing to assist those in need on occasion.

Examples of this are doctors, dentists, auto repair shops, attorneys, etc. There are also local businesses that would be willing to donate merchandise or service to assist the Conference itself. Obviously, these resources would not be in the resource list given to the people we serve. They would be on a special resource list available to members only.

5. What does the Conference do to go beyond just meeting immediate needs (such as rent, utilities, food, clothing) and helping individuals move out of poverty? (check all that apply):

- **Special works or Systemic Change programs of our Council**
- **Referring friends in need to community programs that build skills**
- **Follow-up home visits / mentoring to deepen our relationships with our neighbors in need (describe briefly):**
- **Advocating for change in local, state, or federal policies (cite examples)**

The Rule, Part I, Article 7.1 states: *“The Society is concerned not only with alleviating need but also with identifying the unjust structures that cause it. It is, therefore, committed to identifying the root causes of poverty and to contributing to their elimination. In all its charitable actions there should be a search for justice; in its struggle for justice, the Society must keep in mind the demands of charity.”*

The Rule, Part I, Article 7.2 states: *“Affirming the dignity of each human being as created in God’s image, and Jesus’ particular identification with those who are excluded by society, Vincentians envision a more just society in which the rights, responsibilities and development of all people are promoted. As citizens of one world, Vincentians listen to the voice of the Church which demands their participation in creating a more equitable and compassionate social order, promoting the culture of life and the civilization of love. In this way, the Society shares the Church’s mission to evangelise the world through visible witness, in both actions and words.”*

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with families and communities. It can help an excluded or deprived local community to develop a sense of responsibility and solidarity which leads it to improve its economic, social or environmental well-being, always retaining the personal contact of members with those who suffer.”

Commentary:

All Conferences are expected to do the normal work of the Conference in responding to the immediate needs of those who come to them for help. However, the Conferences are also encouraged to look to their community and evaluate other needs as well as other resources that are available. It is important for the Conference members to understand what is available in the way of help for those we serve: in programs operated by SVdP entities and by religious and community agencies and organizations. The Conference is not an island unto itself. It is part of a spiritual community and part of a secular community. It must operate in both; but in all cases it must work to the benefit of those in need.

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Commentary:

Justice and charity must work hand in hand. We must work toward a just society and continue to fill the gap through charity until that goal is achieved.

The Rule, Part I, Article 7.2 states: *Affirming the dignity of each human being as created in God’s image, and Jesus’ particular identification with those who are excluded by society, Vincentians envision a more just society in which the rights, responsibilities and development of all people are promoted.*

As citizens of one world, Vincentians listen to the voice of the Church which demands their participation in creating a more equitable and compassionate social order, promoting the culture of life and the civilization of love. In this way, the Society shares the Church’s mission to evangelize the world through visible witness, in both actions and words.

The Rule, Part I, Article 7.3 states: *The Society’s vision goes beyond the immediate future, looking towards sustainable development and protection of the environment for the benefit of future generations.*

The Rule, Part I, Article 7.4 states: *The distinctive approach of Vincentians to issues of social justice is to see them from the perspective of those we visit who suffer from injustice.*

Commentary:

When you go to the poor and see them in their own environment, you are seeing the truth of their lives. You get a better understanding of their joys, struggles and sorrows. Based on that perspective, Vincentians help others to understand the impact of issues on those we serve. It is only through that understanding that true progress can be made.

The Rule, Part I, Article 7.5 states: *The Society helps the poor and disadvantaged speak for themselves. When they cannot, the Society must speak on behalf of those who are ignored.*

Commentary:

Vincentians regularly speak with and on behalf of those we serve through discussions with landlords, utility

companies, medical offices, etc. Our role in this case is mainly negotiating costs, time frames, and conditions. In some cases, we are the only voice for those we serve.

The Rule, Part I, Article 7.6 states: *Where injustice, inequality, poverty, or exclusion are due to unjust economic, political, or social structures or to inadequate or unjust legislation, the Society should speak out clearly against the situation, always with charity, with the aim of contributing to and demanding improvements.*

Commentary:

Vincentians have developed a vehicle that allows us to actively work on behalf of the poor and disadvantaged through local, state, and federal structures. Our *Voice of the Poor* Committee activities regularly keep our members updated on what's happening in government that will improve or degenerate the conditions our guests must live and work in. The committee encourages our members to get involved in dealing with these issues.

The Rule, Part I, Article 7.7 states: *Vincentians oppose discrimination of all kinds and work to change the attitudes of those who view the weak or those who are different with prejudice, fear or scorn, attitudes which gravely wound the dignity of others.*

The Society strives, with charity, to foster new attitudes of respect and empathy for the weak, so that all are able to understand, recognize and defend the right of each person to be responsible for his or her own life. The Society promotes understanding, cooperation, and mutual love among people of different cultures, religions, ethnic origins, and social groups, and so contributes to the peace and unity of all peoples.

Commentary:

This is also accomplished through the activities of individual Vincentian members as well as through the efforts of the *Voice of the Poor* Committee. Attitudes are the most difficult to change. It is because of wrongly formed attitudes and opinions that many (or most) of the world's problems exist.

The Rule, Part I, Article 7.8 states: *The Society does not identify with any political party and always adopts a non-violent approach.*

It is good that some members follow and fully participate in their political vocation in such a way that they bring Christian values to political matters. Those members who hold political offices will be asked, always with charity, not to hold any mission of representation in the Society during their term of political office.

Commentary:

The Society encourages members to participate in political matters to the extent that they can use and reflect their basic Christian values. However, it is also important that, if members seek and hold political office, that they do not hold a representative office or position within the Society of St. Vincent de Paul. This is to avoid confusion as to whether this person is speaking on behalf of the Society or on behalf of their own personal political views.

6. Does the Conference enlist the aid of local businesses?

Commentary:

As indicated in 4 above, the Society encourages the Conferences to interact with local businesses in acquiring resources and services to be provided to those we serve.

Resolutions 114/114A describing consequences for non-compliance.

Resolution 114 was approved by the National Council on April 12, 2013. This resolution identifies specific issues of noncompliance which need to be addressed as quickly as possible, violations which can lead to the suspension and removal from the Society of the offending Vincentian, Conference or Council. Stated below is the key portion of that resolution.

Be it resolved that legal issues which involve one Council or one Conference have the potential for affecting the whole Society and, therefore, if not addressed, will lead to the suspension and removal from the Society of the offending Vincentian, Conference or Council if not corrected in a timely fashion. Such legal issues include but are not limited to the following:

- Violation of any state statute, local ordinance, or federal law or any regulations adopted by any state, local government, or federal agency which violation relates to the operation of not-for-profit organizations
- Failing to conduct an annual audit
- Failing to file a Federal Form 990 or any required state form
- Adopting Bylaws that have not been updated to comply with federal requirements
- Giving funds to non-Vincentian organizations or for non-Vincentian activity
- Failing to submit required annual reports
- Failing to allow women or minorities as Conference members
- Maintaining large balances that do not constitute legitimate reserve for future operations and which constitute hoarding
- Failing to enact Bylaws that are in compliance with those approved by National Council
- Failing to make home or similar visits in pairs – i.e., allowing only one Vincentian to make such visits
- Having officers who are not active members of the Society
- Limiting assistance to certain groups to the exclusion of others
- Acting in an autonomous manner and as though not answerable to the Society
- Changing Bylaws to permit activity contrary to The Rule of the Society
- Removing members without complying with The Rule of the Society
- Violating confidentiality of those being served
- The failure of National Council Members to attend National meetings
- Raising funds across Council boundaries without permission and without adequate disclosure to the public
- Any other issues having legal implications.

For more information or a further explanation of this material, contact the National Vice President for your Region or the Senior Director of Governance and Membership Services at the National Council Office (314) 576-3993.