



The Society of Saint Vincent de Paul
National Council of the United States

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.

Conference

Date

This discussion was held at a meeting on (Date) _____ which was attended by the members listed here:

Questions about required practices

For each section, please include a comment or explanation of an action plan for elements that the conference would like to focus on improving in the coming year.

1. Does the Conference meet all the “Minimum Requirements for Existing Traditional Conferences”? *(If you would like a copy of your completed 2021 Minimum Requirements form for your reference, contact the Council Office.)*

Which numbers (1-24) of the Minimum Requirements list are not met?

2. What percent of Conference members have attended Ozanam Orientation? What is the plan for those who have not?
3. What formation/training have Conference Officers and Spiritual Advisor attended?
4. In what ways does the Conference encourage the Spiritual Growth of the members?
5. How does the Conference encourage knowledge of the Rule and adherence to it?
6. Has the Conference adopted set of standard Bylaws that conform to those most recently approved by the National Council (March 2021)

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 Yes
 - b. We have our own 501(c)(3) exemption N/A
 - c. Please enter the date your 501(c)(3) exemption was issued March 11, 2009
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? Yes
9. When was the last Conference audit or financial review (whichever is appropriate) completed? November, 2021
10. Who performed it? What was the scope of the audit or financial review?
Council auditing firm performs full audit every November.

Questions about standard operating procedures and practices

1. How does the Conference encourage attendance at District/Diocesan Council Meetings/Training/Social Events?
2. What means does the Conference use to raise funds?
3. Has the Conference established its own internal guidelines for helping people? What are they?
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?
5. Is the Conference twinning? How and where?
6. What is the Conference plan for obtaining new members? How many new members have you added in the past year?
7. How does the Conference communicate with parishioners/community?

8. What special programs does the Conference have to help people in need?
9. How does the Conference make use of District/Diocesan Council Programs to assist people?
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? *The Council will present a process for Safeguarding compliance to conferences in 2023 so that they can complete the mandatory requirements.*

Questions about recommended best practices

1. How does the Conference make use of the “Serving in Hope” formation program?
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?
3. How many members serve as Officers or Committee Members for the District/Diocesan Council?
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?

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)

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

MINIMUM REQUIREMENTS FOR EXISTING TRADITIONAL CONFERENCES

Existing Traditional Conferences must:

- Adopt Bylaws within one year of their start, and update bylaws whenever new standard bylaws have been approved by the National Council.
- 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. The Conference excludes no one from membership based on age, sex, race, or ethnic background. (Rule, Part I, 3.2)
 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)
 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)
 4. Prayer, spiritual readings, and reflection are a part of each meeting. (Rule, Part III, Statute 7)
 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)
 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)
 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)
 8. All Home Visits and other interviews are made by two Vincentians. (Rule, Part III, Statute 8)
 9. The Conference has person-to-person contacts with the needy. (Rule, Part I, 1.2, Identity Statement)
 10. Home visits are the primary focus of work for traditional Conferences. (U.S. Manual, Page 23)
 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)
 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)

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)
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)
15. The Conference submits Annual Reports to the District/Diocesan Council. (Rule, Part III, Statutes 22 and 23)
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)
17. The Conference maintains a positive relationship with the clergy. (Rule, Part I, 5.1)
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)
19. The Conference provides required support (solidarity dues) for Councils/Region. (Rule Part III, Statute 25)
20. The Conference actively recruits new members such as by utilizing the Invitation to Serve materials. (U.S. Manual, Page 28)
21. The Conference President has served no more than two consecutive 3-year terms. (Rule, Part III, Statute 12)
22. The Conference upholds the spirit of non-accumulation of wealth. (Rule, Part I, 3.14 and Bylaws Document 1, Article 16)
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)
24. The Conference knows and follows the Rule of the Society. (U.S. Manual, Page 14)