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BRICKS

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TOPIC: Escalation Policies & Procedures

Category: Administration

Review Date: April 2024

This procedure was created by the Conference Resources Committee (CRC) to protect all Vincentians and the Council, to demonstrate fairness, and to formally reinforce our commitment to following up on issues in a timely, objective, thoughtful manner. Thus, we ask that this process be followed consistently. The CRC and Vincentian Support Services team is there to assist in any way possible.

This section below is for Volunteers within a Conferences and District. Procedures for concerns involving Volunteers within the Diocesan facility, its programs or activities, please see page 2 of this document.

1. Conference Level:

- Conference President is informed of the issue and offers solution to resolve.
- If the proposed solution is not implemented or issue is not resolved, the President is to document the complaint and send copies to the District and Vincentian Support Services.
- However, if the President is unable or unwilling to take action within a reasonable time, member should escalate to District President.

2. Escalation to District President

- District President to study the complaint and offer solution and implement a resolution.
- Depending on the severity of the issue, time frames for resolution may vary but should be resolved within a reasonable and timely manner.
- When resolved, document the resolution and copy Vincentian Support and Conference Resources Committee.
- If no resolution, District President is to escalate to Conference Resources Committee for investigation and recommendations for solution.



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3. Escalation to Conference Resources Committee

- After reviewing documentation and investigation, CRC will recommend Action for Resolution.
- CRC Committee and President to monitor that the resolution is implemented.
- If, no resolution, CRC Committee is to escalate to the Council President.

4. Escalation to Council President

- The committee believes that most issues that rise to CRC will be effectively resolved at that level. If, however, issues cannot be resolved at CRC level or the recommendation of CRC is of major significance to the Council, e.g., closing a Conference, the issue would be brought to the Council President for further action.
- If not resolved action to remove may be taken.
- Notification of action will be reported to the Board.
- Board discusses and decides on an action to resolve the issue.
- All documentation of process and actions/resolution taken shall be archived.

Concerns and Issues within the Diocesan facility, activities or programs

- Member should bring the concern or issue to the appropriate supervisor, department head or Volunteer Services.
- Said person shall provide direction and resolution and supervise its implementation.
- If no resolution, this will be escalated to the next level of that operational area.
- The next level Supervisor will provide a solution and manage its implementation.
- If still no resolution, the issue will be brought to the Executive Director.
- If still no resolution, the matter will be brought to the Executive Committee for Board action.
- Documentation of this concern/issue shall be archived once resolved.



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Topic: Maintaining A Positive Relationship With Your Pastor

Category: Administration

Review Date: April 2024

Since 1949, the Bishops of Phoenix and Tucson have actively supported the Society of St. Vincent de Paul and its works. Our Bishops endorse the existence and operation of the Society of St. Vincent de Paul at both the Diocesan and parish levels.

Many local pastors also have a positive relationship with St. Vincent de Paul and see the need for helping the poor in their individual parishes. Many pastors allow Conferences to raise funds through activities such as quarterly Fifth Sunday collections, poor boxes, food and clothing drives, and/or other events and activities that enable us to secure goods and/or financial support.

Conferences, however, should be aware that while the Bishops of Arizona support the Society, there is nothing that requires a pastor to have a Conference that operates within his parish. The existence and operation of a SVdP Conference is always at the pleasure of the pastor and so Vincentian Conference presidents must constantly strive to have a positive relationship and to establish and maintain frequent and effective communications with the clergy in their parish. *All members must remember that the Conference president alone speaks for the Conference.*

To maintain a healthy relationship between the pastor and a parish-based St. Vincent de Paul Conference, we suggest that Conference presidents do the following:

Create and maintain open, warm and positive communication lines with your pastor.

Provide regular communications with your pastor. Give him a copy of your Quarterly and Annual Conference Reports as well as a short summary of your current needs, activities and successes. If Pastor is newly assigned to the Parish provide a copy of the Rule and the Manual.

Invite your pastor and priests to attend Conference meetings. Make sure they know that this is an open invitation.

Ask your pastor if he or one of the other parish priests or deacons would be able to serve as the Conference's Spiritual Advisor. If they are not available to do so, ask if they would like to be a drop-in Advisor and include the pastor in the selection of a Lay Spiritual Advisor.

Schedule an in-person meeting with him at least every six months and stress the spiritual nature of the Society. Remind him about the spiritual aspect of our home visits. Explain that Vincentians pray before, during and after each visit.

Finally, stress that the Society is a charitable organization founded in 1833 that currently operates in more than 150 countries in the world. Our goal is not just to relieve material need but to promote growth in holiness among our members and those whom we serve.

Please note an expanded pamphlet on this topic is available by using this link: [Working with your Pastor Pamphlet](#)

You are encouraged to download and read that document.



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TOPIC: New Member Admission Process

Category: Administration

Review Date: April 2024

In order to determine if God is calling them to become a Vincentian, a prospective new member, with the approval of the Conference, will be welcomed as a guest at a Conference meeting.

Important Note: All volunteers and potential Active or Full Members of the Society must complete the Catholic Diocese of Phoenix Safe Environment Training before working or volunteering with a parish conference.

A prospective new member, due to their involvement in the Society's work, may be invited or may convey an interest in becoming a Vincentian as an **Associate Member**:

"Associate Members are those affiliated with the Society by formal action of the Conference or Council with which the member will be joined. Associate Members include those who sincerely and publicly accept the Society's Rule but may or may not belong to the Catholic Church and may or may not attend Conference meetings or engage in the works of the Society on a regular basis. Associate Members are kept informed of the developments and activities of their immediate groupings, as well as the general progress of the Society, particularly in the local area or diocese. They are invited to attend the general meetings and special observances of the Society and to participate in its charitable activities." (Rule: Part III-Statute 3). For Active Membership, according to conference bylaws an active Member must also complete Ozanam Formation Experience (OFE)

It should be noted that for the Conferences associated with the SVdP Diocesan Council of Phoenix, non-Catholic Associate Members, who have completed the basic Ozanam Formation Experience (OFE) classes and who meet all other requirements for active membership may, by a Conference vote, be allowed to make motions, participate fully in Conference discussions, and vote in all Conference matters, but may not under any circumstances hold office. **(See Article 7 of the Conference Bylaws.)**

A prospective new member who may be invited or interested in becoming a Vincentian as an **Active Member** will be given a period of candidacy and discernment during which they will observe the Conference and participate in its activities:

"Active Members are those who participate regularly in the prayer life, meetings and charitable activities through personal contact with the poor of the Vincentian Conference. An Active Member accepts the Rule and Statutes of the Society, belongs to the Catholic Church and is received as a Vincentian brother or sister. Only Active Members hold office in the organization." **(Rule: Part III-Statute 3)**. According to Conference bylaws an Active Member must also complete Ozanam Formation Experience (OFE) classes.

When a prospective new member requests to be welcomed into the Conference as a candidate for Active Membership, he/she begins an Admission Process.

1. The following is the Admission Process. The candidacy and discernment period will last approximately 6 to 8 weeks or more and will consist of the following:

THE CONFERENCE ASSURES COMPLIANCE WITH THE DIOCESAN "SAFE ENVIRONMENT" REQUIREMENTS BY HAVING THE CANDIDATE COMPLETE THE SAFE ENVIRONMENT TRAINING FOUNDATION COURSE/RENEWALS AND A BACKGROUND CHECK. CANDIDATES MUST BE SET COMPLIANT BEFORE THEY ARE CONSIDERED FOR MEMBERSHIP.



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THE CANDIDATE WILL COMPLETE THE FORMATION POLICY REQUIREMENTS AS DEFINED IN THE APPROVED FORMATION POLICY OF THE SOCIETY OF ST. VINCENT DE PAUL PHOENIX DIOCESAN COUNCIL. (CONFERENCE BYLAWS, ARTICLE 7: ALL FULL-ENHANCED (ACTIVE) MEMBERS MUST COMPLETE THE BASIC OZANAM FORMATION EXPERIENCE (OFE) CLASSES AS DEFINED BY THE PHOENIX DIOCESAN FORMATION POLICY.)

In addition to the OFE requirements, the Conference members may read, reflect and share their lived experiences on each section of the SVdP Member Handbook with the candidate. If this process is added, each member must have a copy of the handbook.

A Conference member will be assigned as a sponsor for the candidate. The sponsor will meet with the candidate to respond to questions and to describe the activities of the Conference.

The candidate will be given the opportunity to make at least two Home Visits with different Conference members. The exception would be in a Conference with Special Works where the candidate will be given opportunities for person-to-person service with those who are poor.

The Spiritual Advisor, Conference President, and/or designated Membership Coordinator will lead the candidate in prayerful discernment emphasizing the Society's primary purpose of growth in holiness and guiding them in Vincentian Spirituality.

At the conclusion of the candidacy period, the candidate will have a meeting with the President to discuss the candidate's experiences in the Conference. The candidate discusses the activities and services that they feel called to do as part of their ministry.

At this point, if the candidate has discerned that they have a calling to be a Vincentian they may request to become an **Active Member**.

2. After the President, Spiritual Advisor and the candidate discern readiness for Active membership, the Conference takes formal action, normally by a resolution, to accept the candidate into Active membership. **Rule: Part III-Statute 3)**
3. The candidate is then Commissioned as a new member of the Society and given the SVdP pin. This commissioning should take place at an appropriate time and occasion, normally at a Conference or Council liturgy or at a Festival Meeting. **(Rule: Part III-Statute 4)**
The Commissioning Ceremony for a New Member is found in the Vincentian Celebrations book or online.

The new member will continue walking the Vincentian Pathway through reflection and sharing on the Serving in Hope Modules and the other resources offered by the National Office. The Council will offer opportunities for Vincentian Formation by sponsoring the Ozanam Formation Experience (OFE), retreats and various activities.

Adapted from Document 1671 of the National Council of the United States Society of St. Vincent de Paul, Inc.



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Topic: Preparing for an Upcoming Conference or District Election

Category: Administration

Review Date: April 2024

The major and initial responsibility rests with the current office holder. Getting someone to succeed the President starts many months or even years before. The first step is to try to identify one or more willing candidates.

Ideally, a potential President is groomed and trained, moving up from a Vice-Presidency or other officer position. It is certainly the model situation to have the President-to-Be work closely with the President during his or her last year in office. While that is not always possible, we can do psychological grooming of future Conference Presidents.

- **Pray about it.** We are a faith-based organization. In every opening prayer, we ask the Holy Spirit to be with us in this ministry. Starting in April of an election year, include the following prayer in your closing prayers:

“Dear Lord, we ask you to bless this Conference with continued growth and good leadership. We pray now that the Holy Spirit will inspire one of our members to consider and then accept the responsibilities of leadership in this Conference. We thank you, Lord, for the many graces and blessings you have bestowed on this Conference in the past, and ask for your continued guidance over our humble efforts to serve you by serving your poor. Amen.”

- **Define the job.** Outline the responsibilities of the President (the Rule indicates they are remarkably few). The emphasis is on *simple*. Do not make the job appear overwhelming. The Approved Commentary on Article 7 Part II of the Rule says:

“The President should not assume too large a measure of the Conference’s workload. As a leader, the task is to animate the team, be able to delegate responsibility, and to inspire accountability from colleagues.”

- Therefore, teach that the secret to success in this job is delegation and real sharing of responsibility. This lesson is best taught *by example*, not words.

If you have someone to groom, get them involved *alongside* you. Remember: you are being a mentor. You should be there to answer questions, to make sense out of the sometimes confusing things we experience in our work.



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Once these things are underway, there are other things that can be done to make finding a new President easier. Start planning early (April is about right) for an election in August for a term that begins October 1. *(These things hold true for planned full-term elections but some may not apply for resignations or other short terms.)*

- Starting with the first Conference meeting in the election year, mention that a new President must be elected during the year. Get people to start thinking about this early. Say the prayer (above) at each meeting, asking the Holy Spirit to speak to the person who would make the best servant-leader for the Conference.
- Article 7 in Part II of the Rule states that the Vice President(s) **“organize the election of the next President.”** The first thing is for the first Vice President to appoint a Nominating Committee. Three members is sufficient. Good appointees might be past Conference Presidents, and hard-working rank-and-file members.
- If your desire is that the current Vice President, pantry manager or some outstanding home visit team member be the new President, **don’t appoint** to the Committee anyone you think (or hope) will be the new President.
- The Nominating Committee has the responsibility to contact all members to encourage them to consider serving, who were not present at that meeting, to encourage them to consider serving, and to secure their nominations. A good candidate for President might simply be overlooked and never asked. Why? Because we presumed she was too busy with her kids, or he travels too much on business, or they are too young to have the experience to lead.

It is especially important for the current President to pledge her/his support to the candidates, for nothing is scarier than to take on a new responsibility without the help and Counsel of your predecessor for several months.

- Make it clear that, without an elected President, the Conference ceases to exist as a part of the Society of St. Vincent de Paul. This warning, although a last step and extreme measure, will sometimes motivate members to step forward. After all, most members feel the call of the Holy Spirit to this ministry, and are fulfilled and inspired by the work. We never know how important this work is, personally, to individual Vincentians. Other members would sorely miss the social camaraderie that occurs at the weekly meetings and home visits.



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Topic: Reporting to Your Parish

Category: Administration

Review Date: April 2024

Being a good steward is more than accepting the responsibility for the resources we are given to use; it also entails being accountable to those who provided the resources. *Being a good steward* is part of the reason that the Conferences are expected to provide quarterly and annual reports to the District and Diocesan Councils. And *being a good steward* is the reason behind asking each Conference to make formal reports to their fellow parishioners on a regular basis – either quarterly or annually.

Accountability is one reason; another has to do with public relations. The more that your pastor and your fellow parishioners know about what you are doing, the more they will support your efforts. This holds true for verbal support, monetary support and new members. There are various approaches to how this reporting can be accomplished.

- A very good practice is for the Conference President or designee to have a short meeting with your pastor and give him a copy of your quarterly and/or annual report. It is at this time that you should explain our ministry, the numbers on the report and what they represent, and clarify any misunderstandings or questions the pastor may have.
- Another possibility is to put together a bulletin announcement to thank the parishioners for their support and list by category the type of services the Conference provides.
- Some Conferences print a special flyer which expands on the idea of the bulletin announcement. This flyer is then included with the parish bulletin.
- Another approach would be to arrange to do a pulpit announcement.

Timing can be important also. Many Conferences provide this information in conjunction with fund raisers or membership drives. The week before a scheduled collection or the week of the scheduled collection is ideal times to make this information available to members of the parish. ☀



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Safe Environment Training & Sex Offender Policies

In 2002, the United States Conference of Catholic Bishops (USCCB) established the Charter for the Protection of Children and Young People. This document was revised and expanded in 2005, 2011, and again in 2018. This Charter calls for the establishment of Safe Environment programs in every Catholic diocese operating within the United States.

Motivated by this Charter and its application, the Society of St. Vincent de Paul Diocesan Council of Phoenix adopted a resolution in March of 2008 preventing sex offenders from joining, volunteering, and/or being associated in any way with the Diocesan Council and its associated Conferences and District Councils. This policy also authorizes the immediate removal from participation in the Society and its works for any member, volunteer or person connected to the Society when said person is convicted of a sexual offense and/or if and when the Society is notified of any such past convictions. (See our Diocesan Sex Offender policy at the end of this BRICK.)

The SVdP Diocesan Council of Phoenix monitors the Safe Environment Training status of its potential and existing members, volunteers and associated persons through participation in the Catholic Diocese of Phoenix's Safe Environment Office and its related programs including training, interviews, renewals and routine background checks that are conducted by a Third Party Vendor through the use of Social Security numbers.

Safe Environment protocols for the Society of St. Vincent de Paul Diocesan Council of Phoenix are as follows:

1. No person shall be considered a member, volunteer or associated vendor until the conference president has verified with the Parish Safe Environment (SET) coordinator or the designated SVdP Diocesan Council SET representative that the person is current and compliant with Safe Environment requirements including participation in the background check process and has received the status of "approved".
2. All ministers and volunteers must complete a Renewal class each year. Renewals must be completed between July 1st and December 31st unless an earlier completion date is required by a particular Parish pastor. The renewal time frame is not based on the completion date of an individual's Foundation course and background check but upon the SET fiscal year. Earlier completion dates may be set by the parish and its administration. Such dates must be honored.
3. Compliance with Safe Environment Requirements cannot be certified by obtaining a Class Certificate of Completion only. A Parish Safe Environment Coordinator or the designated SET Coordinator for the SVdP Diocesan Council must verify the current SET status of each member or volunteer.
4. Conference presidents are required to provide their parish SET coordinator with a current membership list no later than August 1st of each year and to submit names of any and all potential members, volunteers and/or associated vendors before that person or company conducts any business or participates in any of the Society's works and ministries.



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TOPIC: Voting at the General Membership Meeting

Category: Administration

Review Date: April 2024

Vincentians often question why business items to be voted on at a particular General Membership cannot be discussed, debated or amended at that meeting. The SVdP Diocesan Council of Phoenix is somewhat unique in its structure and decision making process. While our Diocesan Council has an Executive Board comprised of the Diocesan Council Officers and a Diocesan Council Board comprised of the elected District Presidents and an equal number of Board members appointed by the Diocesan Council President, the power to make decisions in most cases lies with the Diocesan Council itself.

Our Executive Board and the Diocesan Council Board function primarily to ensure that all matters submitted for consideration by the Diocesan Council General Membership are congruent with our Society's Rule, consistent with our Diocesan Council Bylaws and/or policies, are in proper form, have sufficient information for members to consider when voting on the matter, warrant a vote of the membership and are distributed to the Conferences according to our mandated timelines.

The voting members of the Phoenix Diocesan Council are the elected Presidents of the affiliated Conferences who are in good standing with the Society and the Diocesan Council. Each Conference President literally carries the vote of their Conference to the General Membership Meetings and is required to vote as the Conference voted on each and every item before the Diocesan Council.

Because each Conference president is carrying a ballot with the actual vote and will of his/her Conference and because that Conference vote cannot be changed or modified in any way, items ready to be voted on by the General Membership are not debatable. The time for debate on most issues before the Diocesan Council is in our Diocesan Committee structure, at the District and Conference levels, during open forums or at General Membership Meetings designated specifically for discussion of agenda item that will be voted on at a later date.

When time allows, items for consideration are distributed to the individual Conferences and Conference presidents are asked to solicit input from their members so that the matter can be discussed at a specific General Membership Meeting designated for the purpose of discussion and debate. During such discussions, amendments can be proposed and procedural motions are in order. Once the resolution is in final form, it is distributed again for consideration by each Conference and a Conference vote is taken.



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Our structure and voting procedures may at first glance appear stilted and complicated, but their purpose is clear. The Diocesan voting procedures are designed to give the decision making power to individual Vincentians and their respective Conference. Unless they are also serving as a Conference President or proxy for a Conference President, no Diocesan Council Officer, District President or appointed Council Board Member has a vote at the General Membership Meetings. Even the Conference Presidents, only have the power to vote as their Conference voted. Vincentians at the Conference level have a direct voice in the decision making process of our Diocesan Council and our procedures are designed not to restrict input and discussion but rather to allow each Vincentian voice to be heard loud and clear.

(See attached *Voting at General Membership Meeting Policy* approved by the General Membership on September 20, 2003.)

E) Once approved for vote by the General Membership, the following process must be followed to ensure that the Conference Members are aware of the issue and are able to vote for or against the issue.

The motion must be presented in writing at least 45 days in advance of the General Membership Meeting.

The motion is to be sent out approximately 35 days in advance to all Conference members for discussion and vote at a Conference meeting prior to the General Membership Meeting. The President of the Conference then casts a single vote at the General Membership Meeting on behalf of his/her Conference.

Votes may only take place at a General Membership Meeting if a quorum exists. The quorum consists of a majority of the aggregated Conferences served by the Diocesan Council. For example, if there are 75 aggregated Conferences in the Diocesan Council, a quorum exists when 38 aggregated Conferences are represented.

F) The annual budget is an exception to items E1 and E2 above. Preliminary numbers are available in the time frames specified; but final numbers may not be. When the budget is presented to the General Membership in the September meeting, the membership may approve or reject the budget but may not amend it. Amendments to the budget would be substantive motions and would have to go through the normal process. If the budget is rejected by the General Membership, the minutes of the meetings should reflect the recommendations for adjustment, if

any, to be passed on to the Board. ☀



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TOPIC: Acquisition of Property of Vehicles

Category: Financial

Review Date: June 2024

The SVdP Diocesan Council of Phoenix is unique in many ways including the fact that we are incorporated as one entity. The name of the corporation is the Diocesan Council of the Society of St. Vincent de Paul, Diocese of Phoenix.

What does that mean? That means all of the conferences and councils associated with our Diocesan Council are under the same 501(c)(3) corporation with the same EIN number. This provides our conferences and councils many advantages, but it does require us to operate in a cooperative and interactive manner.

Because we are incorporated as one entity, all property such as land and buildings as well as all vehicles must be held and/or titled in the name of the corporation which is our Phoenix Diocesan Council. This also applies to substantive leases related for property, buildings and/or vehicles. In general, such leases would entail long-term leasing contracts with a value in excess of \$10,000.

The purchase, construction or leasing of land, property, buildings, and vehicles by conferences and/or districts should be reviewed and approved by the Diocesan Council Executive Committee, its Council Board, and the Diocesan executive staff. The Diocesan executive staff is pre-authorized by the Diocesan Council to review financial plans including leases and purchases that obligate the Diocesan Council, District or Conference. Additionally, it is necessary to review, approve and record all leases and purchases to facilitate the Phoenix Diocesan Council's ability to insure such items and locations.

The purchase of equipment does not require review or approval of the District or Diocesan Council. For example, the purchase of a refrigerator, freezer or computer requires no reviews or approvals. The purchase of a vehicle (new or used) would need to be reviewed and approved because of insurance and title issues. An agreement with the local parish to co-purchase a nearby lot or building would also need to be reviewed and approved.

If a conference or council wishes to purchase or lease a vehicle, building or land, they should contact the president of their District and/or the Diocesan Council. Additionally, the current Chief Financial Officer (CFO) of the corporation should be notified so that contracts/agreements can be reviewed, all titles are held in the name of the Diocesan Council, and that locations and vehicles are insured.

Remember, when in doubt check it out by contacting your District or Diocesan Council president. It never hurts to ask and consult.



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TOPIC: Conference Annual Audit Procedure

Category: Financial

Review Date: October 2024

Audits need to be performed annually for each District and Conference. The audit may be conducted by two or more members of the Conference or District not associated with the Treasurer's position or by a qualified non-member such as a CPA or Certified Internal Auditor. However, at the time of a change of officers, the audits must be conducted by persons outside of the Conference or District. People generally think that an audit is a financial matter, however, an audit in SVdP should cover more than just the Treasurer's financial portion of Conference operations. The audit should include a basic review of the overall operations of the Conference.

From a general standpoint, the Society expects its Conferences to perform an audit annually. This is stated in a number of different ways in a number of documents. By Resolution 124 of the National Council, the Nationally Approved Bylaws and Resolutions of the National Council have the same authority as The Rule. Diocesan and District Councils also have bylaws and resolutions that amplify local circumstances.

Based on Part III of The Rule, Statute 2, Diocesan and District Councils should make it a formal policy to coordinate the practice and review of annual audits from the Conferences within their area of jurisdiction.

WHAT AN AUDIT INCLUDES

A basic review of the overall operations should take into account:

Minimum Requirements for Existing Traditional Conferences (Resolution 071);

Requisite operational expectations of a Conference such as meeting frequency, doing Home Visits, working in pairs, etc.;

Non-financial recordkeeping and procedures.

Financial recordkeeping and procedures.



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WHO SHOULD DO THE AUDIT

There are two types of audits that are requested by the Society. The first is the simple internal audit and it applies to 90+% of all Conferences in the Society.

The second type is an external audit performed by a qualified individual who is not a member of the conference or Special Works being audited. This second type of audit usually applies to Conferences that have a store and/or one or more special works as well conferences. This also applies to audits performed when there is a change in officers.

RECORDKEEPING REVIEW

Ensuring the records are being kept properly is an essential part of any audit. Part of the operational review is to ensure that the various records are kept for a sufficient time period and are kept confidential. The Manual of the Society, Page 32, has a short list of time periods for documents that can be used for the review. It is reproduced here for convenience.

Annual Conference Report*	Permanent
Letters of Aggregation	Permanent
Bank Deposits	3 Years
Bank Reconciliations	3 Years
Bank Statements	7 Years
Cancelled Checks	7 Years
Invoices Received	7 Years
Case Records & Cards	3 Years
General Correspondence	3 Years
Meeting Minutes	7 Years
Minute Books	7 Years
Treasurer Statements	7 Years

*including statistics, membership list, and items with historical significance

The confidentiality of the information we maintain related to those people that we serve is an important aspect of the Vincentian way. The audit should assure the Conference members and the members of the Council that the records are secure. Confidentiality also calls for us to destroy (not simply discard) the records when the retention time is expired. Shredding is the recommended method of destruction.

One additional consideration should be kept in mind. During any seven year audit period there will be multiple people in the various officer roles. It is important that there is a smooth transition of records moving from one officer to the new one.



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FINANCIAL REVIEW

Bank Account

Every Conference is required to maintain its bank account(s) separate from the parish and separate from the personal accounts of any of the members. There shall be no co-mingled funds. The funds of the Conference must be in standalone accounts not tied to the parish or any of the members. The only exception to this is when a Conference has an approved reserve account. To avoid any perception of hoarding, the reserve accounts should be approved by the next upper Council. The funds in the reserve may be combined into a shared investment account as long as the Conference has sole access to its funds.

Society Expenses Only

All donations to the Society may be used for the legitimate expenses of the Society: assistance to those in need, operational expenses, support of upper Councils, meeting expenses, etc. No Society funds may be given to fund other organizations. The exception to this is in the case of a co-payment where the Conference and the other organization have agreed to share the cost of helping a specific family or individual. This type of transaction does not fund the other organization.

The Financial Audit

Please use the Financial Review Worksheets to complete the following:

1. Verify signers on the account with the signature card at the bank.
2. Review the Conference Guidelines for disbursing funds.
3. Randomly select one month from each quarter of the fiscal year being examined. For each of the selected months, check income:
 - a. Verify that the deposits reflected on the bank statements agree with the income recorded in Conference records.
 - b. Select one deposit randomly for each month to verify that the count sheet, deposit slip, Conference records, and bank statement all agree.
 - c. Review the reconciliation of the Conference's ending book balance (on the Financial Report) with the bank statement to make sure they agree.
4. Check expenditures by randomly selecting at least three (3) disbursements from each of the four months being reviewed:
 - a. Compare the amount on the check with the amount on the bank statement.
 - b. Make sure that checks listed on the reconciliation "clear" the bank on the following month's bank statement. (If a check has not cleared in the following month, determine if a stop payment is necessary.)
 - c. Determine whether the disbursement is recorded in the correct expense classification on the monthly financial report.
 - d. Determine that the disbursement is supported by proper documentation including case record form, receipt, check request form, and/or invoice.

To access the Audit Worksheets go to [svdpaz.org/Vincenian Support/Conference Resources/Audit Process Worksheets](https://svdpaz.org/Vincenian_Support/Conference_Resources/Audit_Process_Worksheets) or use this link [Audit Process Worksheets](#)



BRICKS to build the foundation

TOPIC: Disaster Appeals

Category: Financial

Review Date: June 2024

“When disasters, war or major accidents occur, the Society launches emergency initiatives on the spot and provides funds for the local Society to help victims.” Rule Part I: 4.2

There are two types of assistance when discussing disasters: domestic disaster assistance and international disaster assistance. Hurricanes, tornadoes, floods, tsunamis, and fire are all causes for a disaster. Although SVDP is usually not a first responder, SVDP is on the ground, providing comfort, support, and financial assistance.

In the Rule Part III: Statute 26 we are reminded:

“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.”

When a family loses a home, it is a disaster for that family and their needs will be addressed at the conference level. When a disaster is declared at the national or international level a significant number of people are affected.

A request for financial assistance is issued through either our National Council's Disaster Fund or through our International Council General's offices. Assistance is sent to conferences serving in the area of the disaster. This assistance should be sent to our National Office and identified as either for National Disaster or International Disaster. There is no need to be more specific than that. Please do not list a specific disaster as then the money is restricted for that one particular area. There must be active conferences that can provide the assistance.

When Ukraine was attacked, several conferences wanted to contribute disaster funds. However, there were no conferences in that country still operating and many people were fleeing to other countries. If the money was labeled “For Ukraine” it could not be used in the countries with conferences receiving the refugees. If it was identified as “International Disaster,” it would first be sent to our National Office and then be forwarded to the International Office which maintains records and communications with our brother and sister conferences outside of the United States and where emergency funds are needed.

All disaster funds, whether for national disasters or international disasters should be sent to:

Society of St. Vincent de Paul Disaster Services

66 Progress Parkway

Maryland Heights, MO 63043-3706



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TOPIC: Domestic & International Twinning

Category: Financial

Review Date: June 2024

Conferences and councils help each other in need, both at the National and International level. This is one of the activities most cherished by the society (Rule: Part I, 4.1)

Through the process of twinning, Conferences and Councils help others in need, both at the local, national, and international level. This is one of the activities most cherished by the Society. The awareness of acute poverty and the Vincentian preferential option for the poor spurs Conferences and Councils to assist other Vincentians with less resources or in particular situations. This direct link between two Conferences or Councils, consisting of sharing prayer, a profound friendship and resources is called twinning. Twinning is a 'special work' of the Society of Saint Vincent de Paul. It is one of fraternal union and sharing.

DOMESTIC TWINNING

The Society is a family. Twinning, the sharing of human, spiritual and financial resources, is the ultimate expression of the love and sacrifice that is present in a family. By twinning, we strengthen our bonds as brothers and sisters, encouraging one another in our common mission of spirituality and charity. We are called to pray for one another as we would pray for our own brother. We are called to serve one another as we would serve our own sister.

Within the Society, the term Twinning applies when resources are shared from a Conference to a Conference or a Council to a Council. If a Conference gives money to a Council, it is considered and recorded as *Aid to Upper Councils* not as Twinning and if a Council helps a Conference, it is considered and recorded as *Aid to Conferences*. It is important to remember that twinning is when resources are shared at the same level of the Society.

When funds are needed for a specific situation the twinning request should be from Conference President to Conference President or District President to District President.

Twinning, however, is about more than the sharing our financial resources with other Conferences or Councils. It includes the sharing of our time and our talents. Although the sharing of talent is not recorded on any report all time spent with another conference should be reported in your conference volunteer hours. Sharing our time and talent with other conferences is often critical to the survival of other Conferences and Councils. Several Conferences within our Diocesan Council have needed members from other areas and Conferences to join their Conference as members or officers. Other Conferences in rural and inner city areas need Vincentians from other Conferences to join them in providing services as their access to new members as well as funds is extremely limited.

Many Conferences twin goods to other Conferences. These goods are usually in the form of food. Conferences that do not operate a pantry often do Food Drives and twin their food with Conferences that require large amounts of food because those Conferences are located within a 'food desert'. It is important to note that in those cases, the Conference receiving and actually distributing the food records the food and the Conference collecting and twinning those goods records nothing on their quarterly/annual reports. This is an important practice that prevents the Council from double recording the same donated goods and thus violating IRS guidelines.



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Twinning can be a single event or an ongoing project and relationship.

INTERNATIONAL TWINNING

While the Society is present in more than 150 countries, Conferences are virtually unable to help themselves in the majority of these nations. A system is in place at the national Council of the United States for the protection of contributors. It assures that all donations go to help the poor by requiring, among other things, that the funds be distributed or used by members of the Society of St. Vincent de Paul.

Make the decision to share part of what we have with other members of the Vincentian family who have far, far less. If your Conference doesn't have a specific location in mind, National can match it with an overseas Conference in need. ("Overseas" is anywhere outside the U.S.A., including Mexico and Central America.) The Council General (International) now permits us to twin with national councils, area (district) councils, or Conferences anywhere in the world. As we consider international twinning, remember that a Conference must twin with a sister Conference of the Society. Giving money to someone else, even to a missionary who may be a former pastor and doing very worthwhile things, is not an appropriate use of funds contributed to the Society.

Each U.S. Conference is expected to pray in a special way for its twinned Conference, its members and the poor they serve.

An application may be obtained by contacting the U.S. National Office, St. Louis, Missouri at (314) 576-3993 and ask for the International Twinning Coordinator. For more information, the Coordinator can provide that to the Conference.

All International Twinning MUST go through US National Office who will coordinate the distribution through the International Office. A Conference will receive a transmittal letter from the U.S. National Office at the time it sends the funds to the foreign country. The President of the National Council in that country is requested to sign a "B" transmittal copy indicating that it has received the funds and has delivered them to the proper twinned Conference or council. When the U.S. National Office receives back the "B" transmittal copy, it will send the U.S. Conference a copy.

Please see BRICK for Disaster Appeal requests.

Twinning is not an extraordinary work of a Conference but rather how we live and work as a family. It is the perfect way for us to show our unit and commitment to a global view of poverty and our commitment to help the poor wherever they may be. All Vincentians and all of the poor are our brothers and sisters and in need of our support. It is, after all, what Christ is asking of us "Whatever you do the least of my brothers, that you do unto me".

Nothing can make you twin except the voice of your conference conscience.



BRICKS to build the foundation

TOPIC: Hoarding: Keeping Excess Funds

Category: Financial

Review Date: June 2024

"Money must not be hoarded."

Rule Part I:3.14

As Vincentians, we are asked to love those in need in the best way we can. The only way to do that is to treat each case on its own merit. While establishing general guidelines for assistance has some benefit, Vincentians are called upon to assess each home visit as a unique encounter and should not set predefined limitations on the amount of help to be given or the type of help to be given or the number of times to help someone. To love someone in the best way possible is to keep all of our resources available for our Lord's use. All of our resources include our hearts, our time, our funds, and other things we use to help people.

Members must accept the fact that our donors have given the Conference resources to use to help those in need. **The reality is that the donations (financial, food and goods) we have belong to the suffering, the deprived, the forgotten, the poor, and those in need. We are stewards of these resources and are accountable for how they are used.**

The Rule of the Society makes it clear that Conferences and Councils may not hold onto funds beyond their short-term needs. The Rule reads, "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." (Rule, Part I, Article 3.14)

Hoarding occurs when a Conference decides to keep funds in its financial instrument or food in its pantry rather than helping an individual or family that it is capable of helping. The fact is that once the Conference decides that the request is legitimate and it has the resources to fulfill the request, then deciding to keep the money in the bank, or food in the pantry is the wrong decision and constitutes hoarding.

The Rule goes on to explain who is responsible for the oversight of Society funds, "Councils and Conferences 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 Council or Conference 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." (Rule, Part III, Statute 24)



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According to the Manual, “It is wrong for a conference to seek financial security by building up a large balance for the needs of the future. Conference balances generally should not exceed what they expect to spend during an average quarter. Surplus funds should be shared generously with more needy Conferences or the Special Works of the District Council.”

As a general rule, Conferences and District Council’s should not maintain reserve balances greater than their projected expenses for a given Quarter or 25% of their annual expenditures. Conferences with large reserve funds can be seen as compliant if they are routinely disbursing funds in excess of their income thus making regular progress in spending down their excess funds.

If a Conference receives a large sum of money designated to be spent within their Parish boundaries or for a specific purpose such as food, utilities or rent, the Conference must consider giving away their non-designated funds such as Fifth Sunday collections to other Conferences, Councils and SVdP programs in order to bring their financial assets to a more appropriate level.

Conferences that operate a store, a dining room or other SVdP programs such as a Dental Clinic should maintain a three to six month reserve to cover fixed expenses. Conferences and Councils may also set aside Capital Campaign funds that are restricted and designated for purchases of property, buildings, vehicles or to start new programs. All Capital funds must be used solely for the expressed purpose that they were raised for and expended in a timely fashion.

Conferences that are blessed with funds in excess of their normal needs, must always keep in mind that many Conferences in poor and rural areas have few if any sources of income. It makes no sense that the “haves” among us would hold onto money they do not need while the “have nots” turn the poor away on a daily basis because they have nothing to share with them. In Luke 12:48 Jesus challenges us by saying, “Much will be required of the person entrusted with much, and still more will be demanded of the person entrusted with more.” Much is expected of those Conferences and Councils to which much has been given. Let us share with open and generous hearts and with a desire to be one in solidarity and support of one another.

Suggested Ways for Conferences to expend excess assets:

To the Diocesan Council Aid Fund

To the Phoenix Diocesan Council Vincentian Endowment

To poorer Districts to distribute to their conferences most in need

To the Phoenix Diocesan Council and its programs
including the Scholarship Program and Family Support Services

To SVdP Domestic and/or National Disaster Fund

Excerpts taken from the Society of St. Vincent de Paul’s National statement on Hoarding.



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TOPIC: Investments, CDS & Saving Accounts

Category: Financial

Review Date: June 2024

"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."

Rule, Part I, 3.14

In cases where a Conference receives a large donation or has a bank account balance that exceeds what they would normally need to fund their works and expenses, it may, in consultation with their District president, develop a plan to supplement monthly expenditures with income from invested funds. The large donation or excess funds may be invested in a savings account, Certificate of Deposit (CD) or in equities or bonds. "Hoarding" would result if the Conference purposely allows the principal of the investment to grow with the sole objective to accumulate additional excess funds.

A Conference should create a plan to eventually draw down the investment for the purposes of assisting the poor through the works of their conference or the larger Society including twinning with other Conferences or in making contributions to Higher Council works or programs.

In setting Conference Guidelines, members should remember that assistance to the people we serve is based on their need and not on a need or requirement to maintain a certain level of funds in Conference investment portfolios, CD's or saving accounts. The one exception to the concept of reserves is in the case where the Conference itself is operating a special work, such as a thrift store or a dining room. A portion of the funds may be placed in a reserve to pay anticipated expenses (such as rent, utilities, etc.) for a short period of time (up to six months is recommended).

A Conference that is presented with a large financial gift should refer to the Phoenix Diocesan Council [Policy for Conference Funds Management](#) which is attached as an Appendix.

Remember, the Society relies on Divine Providence and the need to put funds to work toward our mission as expediently and effectively as possible.

APPENDIX: POLICY FOR CONFERENCE FUNDS MANAGEMENT

Policy for Conference Funds Management

As a "collective" entity, The Diocesan Council for the Society of St. Vincent de Paul and its affiliated Conferences have a fiduciary responsibility to ensure the appropriate stewardship of assets contributed directly to the Council and its Conferences. The Council has, over many years, established a formal process to ensure this fiduciary responsibility is fulfilled, including the formalization of an Investment Committee (Committee) comprised of Board Members, Conference Members and outside investment professionals. The Committee has conducted a formal selection process to engage a third-party, fiduciary provider of investment advisory services (Investment Advisor) to manage the investment process under the oversight of the Committee and, ultimately, the Society's Board. Additionally, the Committee has established an investment policy (Investment Policy Statement) to facilitate the governance of assets gifted to the Society and ultimately, protect the long-term, continuation of the mission of the Society through disciplined investment management of these assets.



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Given this context, the Society's Board is providing this policy to the Conferences to provide the same level of fiduciary oversight and stewardship of assets given directly to the Conferences. The Conferences subject to this policy shall:

- ☐ Conferences with operating cash or longer-term assets of \$100,000 or less, are required to ensure the safe keeping of these assets by having the assets invested in checking, savings, money market or Certificates of Deposit within FDIC Insurance coverage at a local bank or financial institution.
- ☐ Conferences that are given contributions or who have accumulated excess reserves greater than \$100,000 are expected to notify the Chief Financial Officer, and the Chair of the Society's Investment Committee. Together, with the Conference, this collective group will secure investment advice and establish a separate investment account in the name of the Conference for the stewardship of these assets and protect the long-term, financial wellbeing of the Conference. The investment plans for such contributions will be developed with the direct input of the Conference's leadership and managed in accordance with the Society's Investment Policy Statement.
- ☐ Conferences are generally prohibited from holding individual equity or fixed income securities that do not fall under this policy unless these securities are under a restriction established at the time of the gift by the donor. If a contribution to a Conference meets these criteria, the Conference will notify the Chief Financial Officer and the Investment Committee Chair. Together, with the Conference, the collective group will secure investment advice with respect to a plan for the long-term stewardship of these securities.

Approved by the Diocesan Council Board on June 20, 2018



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TOPIC: Quarterly and Annual Reporting

Category: Financial

Review Date: June 2024

The Quarterly and Annual Reports are extremely important. They are used for government statistics and the basis for applying for grants to support the work that we do. To ensure that your report is done in an expedient and timely manner, as well as correct, contact Vincentian Engagement Support Services if you have any questions.

Donors provide resources that we use on a regular basis within our Conference. Included in those resources are money, food, furniture and clothing. We are expected to be good stewards of the resources that we are given. We are expected to track those resources and to utilize them in a smart and loving manner. The resources do not belong to us; they belong to those in need. We are agents caring for and utilizing those resources on behalf of those in need. Besides using those resources properly, we are expected to report to our donors how we have used them.

The Internal Revenue Service (IRS) has granted the Society of St. Vincent de Paul a 501(c)(3) tax exemption status which allows two advantages: we do not have to pay income tax and we can solicit tax deductible donations. In exchange for those privileges, we are expected to keep proper records related to what we do and how we spend our money. The Diocesan Council prepares an annual report, known as a Form-990, which is a summary report of how the Diocesan Council and all of the Conferences within its area utilize their funds. This record keeping and reporting is a legal obligation.

In order to fulfill this dual obligation, Conferences are to prepare both quarterly and annual reports. The quarterly report effectively acts as an overview of Conference activity that can be reviewed and evaluated by the District President. The quarterly report identifies the income on which the Conference is to tithe 10% to the District Council. This is defined in the Rule and District Council Bylaws as support which each Conference is obligated to provide to the Council. The Diocesan Council Aid Committee meets annually to review Annual reports and determine how Diocesan Aid will be distributed.

What is Required?

It is important to understand the reporting period, quarterly reports and annual report process of the Phoenix Diocesan Council. Quarterly Reports provide financial records for a three-month period and the Annual Report is for an entire fiscal year.

Reporting Period: The Fiscal Year for the Phoenix Diocesan Council is October 1 to September 30 of each year.



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Quarterly Reports: The Quarterly Report includes the Quarterly Conference Report and Special Works Report. These reports provide financial information for a three-month period.

1st Quarter – October 1 to December 31

2nd Quarter – January 1 to March 31

3rd Quarter – April 1 to June 30

4th Quarter – July 1 to September 30

Date to Submit to District President: The Conference maintains the original of each quarterly report for its records and submits a copy to the District President. The tithing check should be sent with each quarterly report.

1st Quarter – January 31

2nd Quarter -- April 30

3rd Quarter – July 31

4th Quarter – October 31

Date for the District President to submit to VESS.

1st Quarter – February 15

2nd Quarter – May 15

3rd Quarter – August. 15

4th Quarter – November 15

Annual Report: The Annual Report provides the financial information for the entire fiscal year, which is October 1 to September 30. The Annual Report includes the Annual Conference Report, Membership Roster, Special Works Report, Bank Statement closest to September 30, Safe Environment Membership Compliance Report and Conference/District Guidelines. The dates for submission follow the same rules as the 4th. Quarter reports.

The Conference maintains the original of the Annual Report for its records.



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TOPIC: Diocesan Food Drive

Category: Food & Pantry

Review Date: June 2024

The Annual Diocesan Food Drive has been a tremendous boom to the Conferences of the Society in the past. In order to take full advantage of the food that is collected it is important to take the time to plan and prepare for the overflowing generosity of our donors.

Following are some proven ideas for making your Parish food Drive a success:

Utilize the Youth of your Parish – Reach out to Youth ministry groups or teens that are in need of service hours.

Supermarket cart loans – Contact a local supermarket and borrow shopping carts for the days you are collecting food. Carts can be used to transport food from cars to the Parish collection area.

Patrol the church parking lot - Accept the food from the donors right at their car and move the food to the Parish collection area.

Collect Sturdy Boxes – Collect sturdy boxes for collection day and start collecting a month ahead of your event date. It is best to collect the same size paper boxes which will allow for easy stacking.

Opportunity for smaller children - Ask the Pastor if children can bring their “offering” up to a special place during the Offertory of the Mass or at the children’s or family Mass.

Additional Drop-offs/Donations – Provide Instructions for additional drop off opportunities for those who didn’t bring food and want to participate. Make sure you have additional bags available during your event.



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TOPIC: NO Food Repackaging

Category: Food & Pantry

Review Date: June 2024

Food Repackaging is not allowed by the Council. **The possibility of contamination and liability does not justify the effort.**

Should a Conference receive a quantity of large sized commercial products such as sugar or flour with current dating and the packaging is intact, they may consider bringing it to the Dan O'Meara Center on Watkins for kitchen use.



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TOPIC: Pantry Shelving

Category: Food & Pantry

Review Date: June 2024

Many Conferences have a food pantry, which they keep stocked with various food items that are used to make up food boxes to be taken to families in need. Because of the nature of the product that is stored on pantry shelves, there are specific requirements related to the makeup and use of the shelves. These requirements are related to construction, maintenance and cleaning and are as follows:

Wooden shelves must not be used because they are too porous and spilled liquids would be absorbed in the shelving possibly causing a health problem.

Wood is discouraged as a material for the framework of the shelving. The better material for the framework is metal.

Plastic/vinyl/fiberglass shelves are not appropriate because they typically are not strong enough to hold the weight of many of the food items.

The best material to use is stainless steel shelving or stainless steel mesh shelving. The likelihood of contamination is minimal with stainless steel material and it is normally very strong.

Toxic materials or non-food liquids (such as liquid detergent) must not be stored on the same shelf as food items nor on the shelves above those containing food items.

Nothing should ever be stored on the floor.



BRICKS to build the foundation

TOPIC: Collaboration Between Conferences

Category: General Information

Review Date: May 2024

As the economy of the United States shifted from being primarily an industrial nation to one that produces ideas and technology, the concept of collaboration became a key word in business and in education. In many ways, we as Vincentians, were well ahead of the curve regarding this concept as our Society has from its very founding been based in collaborative relationships. We encourage and foster collaboration between our members, our Conferences, our Councils, and other charities, outside organizations and even at times government programs.

The word collaboration comes from the Latin work *colaborare* which literally means to work together, to join in creating something or some action. So, the very process of being a Vincentian requires us to be collaborative in nature. The strongest and most common collaborations for us are those within our Society. On a regular basis, Conferences work together through their District and Diocesan Councils but sometimes we forget about our call to work together as one family and when that happens many things break down. This break down in our supportive relationships with one another can be a huge obstacle to unity and can cause us to be less responsive to the poor and to one and another.

In order for effective collaborations to take place each Conference and Council must have the ability to make decisions and to have those decisions accepted by the other groups involved in the process. As Vincentians, we understand that other Conferences and Councils may have different practices and protocols. Mutual trust and respect are primary components of collaborative relationships. Collaboration also requires cooperation, compromise, and frequent and effective communications. Collaborative projects need to have clear delineations of responsibilities and all participants need to be accountable for their part of the agreed upon works or actions.

Some collaborations are simple, single or infrequent in nature and can be facilitated through a couple of phone calls or emails. Others require a formal protocol for dealing with situations or ongoing programs. For example, it is not uncommon for Conferences to receive a call for help from someone outside the Conference's geographic boundaries. The rule clearly states that Parish based Conferences are first and foremost responsible for taking care of the poor and needy within their boundaries. Thus, going outside of a Conference's boundaries would most likely fall outside of that group's normal practices and procedures.

The accepted practice for the Conferences associated with Diocesan Council of Phoenix, is to refer a guest calling from outside of the Conference's boundaries to the Conference where they live or to the next nearest Conference in their area. If additional assistance is deemed necessary collaboration should be between Conference Presidents.

Conferences also collaborate in and through ongoing relationships. For example, several Conferences collaborate with the St. Matthew's Conference by providing food, twinning and time. The collaborative Conferences involved in this project have agreed that the participating Conferences will provide resources and workers while the host Conference alone determines who, what, and when Neighbors will be served.

At all times, we must remember that we are one family united in love of God and one another that is dedicated to the service of those in need. We can and must remember that working together only strengthens our bonds and helps us to enrich our service to the poor. Be creative. Be inventive. Be collaborative by never forgetting we do not serve alone but with all Vincentians.



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TOPIC: Gifting the Vincentian Way

Category: General Information

Review Date: September 2024

"...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..." Rule, Part III, Statue 26

Gift giving is a natural human behavior. If you watch toddlers at play, you will often see them offering their toys and/or food to other children and adults. Giving gifts is a way of showing love and appreciation to others. Giving is a joyful and gratifying activity for both the giver and the receiver. A gift is often the best and most concrete way for us to show how much we care. Because Vincentians have giving hearts, conferences and councils are often tempted to use conference or council funds to provide gifts and/or contributions to the clergy or to their parishes.

On the surface, giving gifts or funds looks like a great way for conferences and councils to contribute to our individual parishes and to show our appreciation for the support of our clergy. However, if we look deeper into such practices, we see they fall well outside the mission of the Society and the intent of our donors. The Rule of the Society is clear that the funds donated to the conference are for the poor. Our funds are given to us by donors who want us to use those funds for the direct benefit of the poor. Giving away the donations that we receive from others to show our appreciation is not appropriate as this money was not ours to begin with. Certainly, few if any of our donors would step forward to contribute to us if they knew we were simply passing on their funds in the name of the Society as gifts to clergy or in support of other parish programs or projects. If they wanted their funds to be used in that manner, they would have donated directly to that cause. Conferences and councils are free to give gifts to the clergy for their support and encouragement, but they must come directly from donations of members. The best way to collect funds for such gifts is to take up a special collection before or after the meeting so that members understand it is for a specific purpose other than the works of the Society.

If conferences or councils want to support a parish project, program or campaign, they can do a separate fundraiser designated for that purpose and donors need to be informed in advance where the funds are going so that they have no expectations that the funds will go to serve the poor and needy. For example, one conference in our Diocese wanted to help fund the Capital Campaign of their Parish's Building Fund so they compiled, published and sold Community Cookbooks. The project was clearly marketed as benefitting the parish and the index page of each cookbook indicated where the profits would go. Several of our area conferences participate in their annual parish or school auctions. When participating in these fundraisers, they are careful to make sure that all items donated come directly from their members and a written disclaimer saying that no funds from the conference were used to secure the auction items is clearly displayed.

It only makes sense that we cannot express our gratitude or support by using other people's donations. We must give from our own pockets, our own talents and our own hearts, for if we do anything else it is really not a gift from us at all.

Please note that paying for things such as rent and electricity for your conference space at the parish or for copies is an operational expense and is not considered a gift or a donation.



BRICKS to build the foundation

TOPIC: How Funds of the Society are to Be Spent

CATEGORY: General Information

Review Date: April 2014

“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 such as FAMVIN Alliance. The Treasurer is charged as the responsible officer to ensure adherence after consultation with the Conference or Councils.” (Rule: Part III, Statute 26)

At first glance, this particular statute of the Rule of the Society of St. Vincent de Paul may appear not in keeping with the overall goals and mission of our organization. Vincentians are often confused by this restriction and many try to excuse actions that are in conflict with this statute by saying things like, “What difference does it make how the money gets to the poor as long as it gets to them?”

On the surface such thoughts appear to provide us with ample and righteous justification for non-compliance to the Rule, but in fact there are strong reasons and great wisdom behind this directive. Sharing the resources of the Society with other organizations violates our own mission, ignores the intentions of our donors and disregards the guiding principles and very essence of who we were called to be.

From the first days of our Society until today, we as Vincentians have functioned solely as frontline or primary providers of services to the needy. SVdP Conferences and Councils do not fund others to do our work for us. On the other hand, some other well-respected charities such as the United Way, the Board of Visitors and various types of foundations exist primarily as second level or supportive groups to fund the works of others. While financially supporting the work of others is valuable, this has never been the function of the Society. Vincentians deliver the gifts they have been given directly to those in need.

As our culture becomes more and more complex and as more and more scam charities come on the scene, it becomes extremely important that our Society remains transparent and that we remain vigilant in honoring the intentions of our donors. The groups, organizations, businesses, families and individuals who support us are giving us money and goods to help the poor directly, to do what Vincentians do in a Vincentian way. As members of the Society, we are free to donate to other causes in our own name. We are free to work and help support fundraising for other worthy causes. We cannot, however, divert funds given to the Society to a cause just because we have determined to be worthy.

This concept applies even to our in-kind donations. For example, a Conference may not hold a food drive for or with another charity such as a local or community food bank unless that connection is disclosed up front to all potential donors. If a Conference works in a collaborative relationship where Vincentians work in the food bank in the name of the Society, they can do a mutual food drive provided donors are made aware of this relationship. Conferences must openly communicate with our donors and never assume our donors know how their donations are used.



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Many Conferences can and do support outreach work in areas that do not have a SVdP Conference such as a sister parish or outlying mission. Vincentians can use the funds of their Conference and the Society to help outside their normal area of service provided that Vincentians are actively involved in the actual ministry and the distribution of goods. This means that instead of sending \$1,000 worth of gift cards to the Principal of a Mission school, Vincentians must get into their cars, drive to the Mission, meet with the people and hand out the gift cards themselves.

The most important reason for not sharing our funds with other charitable groups is that it violates the very essences of the Society. Chapter 2, Page 19, of the Manual points out “Ministry is the bridge that connects the Gospel to the needs of the people. Through ministry, we share with others a glimpse of Jesus. The ministry of a Conference of St. Vincent de Paul is to bring concrete aid and the comfort of the Gospel to those who are poor and suffering.” For Vincentians, money is the means rather than the ends. We render aid so that our brothers and sisters can experience the love of Jesus Christ firsthand, not indirectly.

The words of the Society as articulated in the Manual are clear and articulate the focus and limits of our work. Chapter 2, Page 27 of the Manual states “Funds donated to the Conference must be used only for the works that involve the personal service of members of the Society. As generous as the Conference should be to needy individuals, it cannot provide funds to causes outside of the Society, except, occasionally, for other branches of the Vincentian Family. The Society does not raise money for activities in which its members are not personally and substantially involved”.

As Vincentians, we bring God’s love to those in need; no one can do that for us. We serve the Lord by the strength of our backs and the sweat of our brows. It must be our actions that proclaim God’s concerns for his people. It must be our prayers that are lifted up in the homes of the needy. It must be our hands that carry in food boxes. It must be our arms that embrace the broken hearted and it must be our love that encircles the people we serve. God called us and sent us to the poor. The Lord did not ask us to send others to do the work for which we were called, that is ours to do.



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TOPIC: Membership Status: What Does It Mean?

Category: General Information

Review Date: September 2024

The Society of St. Vincentian de Paul has many individuals and groups that are intimately involved with our organization including our members, volunteers, donors and neighbors in need. Most of these individuals and groups have a deep commitment to and interest in the Society and thus serve as stakeholders. A stakeholder is a person who has a vested interest in an organization or society and in its success. So that means that all Vincentians are stakeholders in the Society.

Because of the very nature of being a stakeholder, the majority of the Society's members value and treasure their membership status. This is at times unfortunate because in truth the Society values all members regardless of their membership status. If we understand that being a Vincentian is a lifelong vocational call, it is easy for us to understand that such a call would naturally ebb and flow as we live through the various stages of our lives. And so, for most Vincentians, our membership status will change from time to time.

The terms and definitions of active and associate members is meant to be an indication of a person's activity level within the Conference and its works at a particular moment in time. The Rule defines active members as those Catholic Vincentians who, in addition to meeting formation and safe environment requirements, attend meetings and participate in the works of their Conference on a regular basis. Associate members must meet safe environment requirements but do not have to be Catholic or attend or participate in Conference meetings or works on a regular basis. They do however need to be associated with the Conference in some active way even if that association is limited in time and scope.

In conferences under the direction of the Phoenix Diocesan Council, associate members who are not Catholic but actively participate in the works and meetings of the conference and who have completed the OFE training requirements may vote on conference issues and motions. They may not hold office. These members are considered associate members with voting privileges.

The Society holds that while the support and activity of associate members is of great valuable, the right to serve as an officer and to vote is reserved for those members who are Catholic and actively involved in the day-to-day operations of the group. We must always keep in mind that the Society is stable but not static, and that unless members are involved in a Conference on a regular basis, they miss the tenor of the group and its movements.

The Society allows each Conference to define what is regular attendance and activity thus allowing every group to decide when and how membership statuses will change. For example, a Conference could establish a guideline that says once a member is absent from their meetings and works for three months, they will be automatically moved to associate membership status. The same group should also define when and how a member would be moved up from associate to active status.

This type of fluidity of membership status allows a Conference to adjust its quorum and to keep track of those members who are eligible to vote and hold office. Being a long time Vincentian does not qualify someone to be automatically listed as an active member. Members who are no longer able to attend or participate in our meetings and works must be held in the highest regard, included in our prayers and communications and invited to join us as much as possible but none of these things are contingent on their membership status. Associate and absent members are still important and a vital part of our Vincentian family not because of their membership status but because they are our brothers and sisters for life.



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When we keep names on our active membership list that are no longer really active it not only skews our quorum requirements, it allows the active member status to become enshrined as a sign of value and importance. When that happens, members feelings are deeply hurt when their membership status is finally changed or their names completely removed from our rosters. They feel demoted and often demoralized when nothing is farther from the truth.

If Conference officers monitor and change the status of members as needed, then the concept of membership status takes its rightful place as a mere snapshot of a Vincentian's activity level within the Conference at a particular time. A stakeholder is a stakeholder regardless of whether they are full or part-time.

As Vincentians, we have a vocational call to grow in holiness and that call is encapsulated within our overall commitments in life including work, family and God. It is not tied to our membership status but to our hearts and our love for God and others. Our membership status is a name that conveys our activity level it is not who we are but merely a designation of what we are doing with our Conference today.



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Topic: Parliamentary Procedures for Conference Meetings

Category: General Information

Review Date: January 2025

Parliamentary Procedures are a set of accepted rules for conduct and decorum at meetings that allows everyone to be heard, to make decisions in an orderly and timely fashion and to record those decisions in a reliable and consistent manner. The Society of St. Vincent de Paul does not have a constitution but does have a Rule and bylaws at all the various levels. When the Rule and the bylaws are silent in regards to procedural situations, the Society has set Robert's Rules of Order Newly Revised as our default rules of order.

Because the Society and its conferences strive to make the majority of decisions by consensus, Robert's Rules of Order are seldom needed during a conference meeting.

Here are some major points for conference presidents to consider when setting their agenda and chairing conference meetings:

- A quorum is a simple majority or 50% of your current voting membership. It is not 50% percent plus one. However, if you have an odd number of members, since you can never really have half a member, you always round up.
- Silence by the assembly gives implied consent and the assembly may move forward as if the matter has been adopted.
- Although our sample agendas have the word Old Business, there is no such thing. The correct term is Unfinished Business. This section of the meeting is for action items that were previously brought up but where action was deferred.
- Items to be considered at a later date are not tabled, there are postponed. Tabled items must be dealt with during the meeting in which they were tabled.
- New Business is for items where action can be taken. It is not for new discussion only items or brainstorming.
- Minutes may be approved by consensus and no motion or vote is needed to approve them.



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• Treasurer's Reports are not approved. They are filed for an annual audit. The conference does not have a copy of the check book or the reconciled Bank statements and thus are unable to authenticate the report.

Remember to be in "Good Standing" all Conferences must:

- Hold in-person meetings at least twice a month. Hybrid meetings with a combination of in-person and remote attendance to accommodate the needs of homebound members may be conducted, however, members attending from out of the parish area must meet all full member requirements in order to vote.
- Have an active Spiritual Advisor and include Opening and Closing prayer and a Spiritual reflection at every meeting.
- Have a full slate of conference officers that meet the full enhanced member requirements.
- Follow the SVdP Meeting Agenda for all meetings.
- Have Secretary minutes and a Treasurer's Report at each meeting.
- Obtain verification that all members, volunteers & employees are Safe Environment compliant and approved.
- Provide person-to-person services to our neighbors in need and, as often as possible, through Home Visits
- Conduct home and pantry visits in pairs.
- Be represented at 80% of their District Council and 50% of the Diocesan General Membership Meetings.
- Complete and submit Quarterly and Annual Reports in a timely fashion.



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Topic: Politics and the Society

Category: General Information

Review Date: January 2025

The Society does not identify with any political party or candidate and always adopts a non-violent approach.

Rule: Part I, Section 7.8

Early on, Blessed Frederic Ozanam and the co-founders of the Society of St Vincent de Paul agreed that partisan politics was to have no place in our Conferences and in the greater Society.

The Society does not identify with any political party or candidate and must remain independent. The Rule teaches us that all members of the Society must refrain from the injection of partisan politics into our meetings and activities, and political discussions and advocacy of a political nature in our Conferences and meetings is strictly prohibited.

Servant leaders of the Society, (Conference, District and Council Presidents) must strictly enforce a moratorium of all partisan political discussions or activity to ensure that we do not alienate our members, volunteers and donors which make the significant charitable works of the Society possible.

The Society recognizes that individual members are free to engage in partisan politics on their own as private citizens, and even encourages members to register and to vote their conscience, but even advocacy by the Society on issues that directly affect the poor (through the Voice for the Poor committee) is not to be partisan and must be approved/authorized by the Council President and Board.

If adherence to The Rule isn't sufficient on its own to deter partisan political discussions and activities in our Conferences/Council and meetings, the Internal Revenue Code states that all 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in any political campaign or on behalf of (or in opposition to) any candidate for elective public office. As such, political discussions at our Conference/Council meetings and gatherings additionally put our tax-exempt status at jeopardy and should be avoided.

Please ensure that our Rule regarding partisan political activity is followed and that discussions and materials that are to be distributed are not political in nature.

Universal adherence to the Rule is paramount to ensuring the Society's continued ability to be a network of friends, inspired by Gospel values, growing in holiness, to build a more just world through personal relationships with service to people in need.



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TOPIC: Proper Use of Donated Items

Category: General Information

Review Date: September 2024

***The Society has held from the beginning that the funds donated to the conference belong to the Poor.
(Manual Chapter 2, page 23)***

Whenever food, money or any other items are donated to our Society of St. Vincent de Paul we are entrusted with its distribution. It is extremely important that our donors have the complete confidence that we properly allocate the donations that they have designated for the poor.

The unauthorized removal, for personal use, of any food, money, gift cards, bus passes, gas cards, clothing, furniture etc. is totally unacceptable. Anything donated to our Society of St. Vincent de Paul is not to be converted to personal use.

If there is an abundance of particular items there is nothing wrong with sharing with other Conferences in your district or with the Reclamation Center.

If it necessary for a member to become a Neighbor, they should be treated as any other Neighbor; however, for the obvious reasons, it should be handled with more discretion.

To volunteer is to act of one's own free will without any expectation of any valuable consideration. In the true spirit of volunteering, no return is expected.



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TOPIC: Recruiting New Members

Category: General Information

Review Date: October 2024

The Mission of the Society of St. Vincent de Paul is “a network of friends, inspired by Gospel values, growing in holiness and building a more just world through personal relationships with and service to people in need.” Volunteerism, therefore, is the heart of the Society of St. Vincent de Paul and our work helping neighbors in need.

Recruiting new members to the Society is crucial to the ability of Conferences to carry out their work of meeting their neighbors in need. New members help to share the workload, provide energy, and bring new ideas to even the most active conference. In order to hold a successful recruitment drive, however, your conference needs to develop a clear and thoughtful strategy. Bringing new members into your conference requires commitment so it is crucial to carefully consider your Conference’s needs, motivations, and desired outcomes in pursuing a program of recruitment and renewal.

It has been proven that the best way to recruit new people for your organization is the personal invitation. Challenge every member of your Conference to invite one friend or family member to join the Conference. Your Conference would easily double in size. This is because people have a tendency to trust the recommendations of people close to them, people whose opinion they value.

Are there parishioners who members of your conference think might be particularly suited to or interested in the work of the Society? Every parish has people who are concerned by the social issues in their communities and are looking to turn their concern into action. By identifying these parishioners and inviting them to join the work of the Society, you just might pique their interest. Unlike the other strategies identified below, personal invitations can be extended as part of ongoing recruitment efforts.

If you have enjoyed being a Vincentian, then you probably have talked about it to family members and friends. Spreading the word about something good can prove to be contagious. If being a member of the Society has truly had a positive impact on your life, then you likely want to share that with others.

Conference meetings are not necessarily the most effective way to motivate potential members to join us. Most are motivated not by our spirituality and fellowship but by a desire to serve others. Start by encouraging them to participate in some activity of the Society. Invite them to participate in a special work such as accompany you on a home visit to observe how we serve those needing help. Exposure to who we are and what we do is one sure way to make someone want to know more. Of course, keep in mind that all you can do is invite them. It is the Holy Spirit that will move them to join us.

Be sure to assign a current member to work beside your potential recruits during their participation in one of your activities or special projects. Get to know them and start talking about what it means to be a Vincentian. As they show an increasing interest in the Society you can invite them to a conference meeting or a special Conference event such as a social or retreat.

Ideas for Recruitment:

Bulletin Announcements and Posters: Consult with your pastor about making use of parish communication tools such as a notice in the church bulletin or a poster announcement on parish bulletin boards to get the word out about the Society and your desire to bring in new members.



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Social Media: Posting short You Tube videos or posting on other social media sites are often effective attracting younger members. Keep postings short and focused on your works and upcoming events. When postings, be sure to keep them up beat and current. National has videos and tips available on recruiting new members. Go to <https://members.ssvpusa.org/communications-branding/> and click Membership Marketing Materials to find free digital downloads, including flyers, banners, postcards, yard signs, and more!

Pulpit Talk: Aside from personal invitations, a brief and focused talk from the pulpit inviting parishioners to join your conference will probably be the most effective tool for recruiting new members. Consult the National SVdP website for a detailed description of the *Invitation to Serve* program at <https://members.ssvpusa.org/growth-revitalization/planning/>

Remember it is the Holy Spirit, our mission, our passion, our zeal, and the power of serving others that leads others to join the Society and keeps them there.

For additional suggestions please use this link [Growing Your Conference Pamphlet](#) to refer to the Growing Your Conference Pamphlet found online at svdpaz.org/Conference Resources



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TOPIC: Safe Environment Individual Requirements

Category: General Information

Review Date: October 2024

In 2006, the United States Conference of Catholic Bishops (USCCB) implemented the Charter for the Protection of Children and Young People designed to respond to the needs of past victims of sexual abuse, to protect future generations, and to re-establish trust through increased fidelity and vigilance. In this Charter, the American Bishops articulate a commitment that includes guaranteeing effective response to all allegations of sexual abuse of minors; ensuring the accountability of our Safe Environment Policies and Procedures; and the protection of the faithful for the future.

Since that time, the Phoenix Diocesan Safe Environment Office under the direction of Bishop Dolan has adopted policies and procedures that include participating in a training program known as the *Safe Environment Training* (SET) program that includes a foundation course, annual renewals, and periodic background checks.

According to the policies and procedure of the Roman Catholic Diocese of Phoenix, as of July 1st, 2009, all full and associate members of the Society of St. Vincent de Paul and those volunteers associated with a conference and its works within our Diocese must:

- Complete and submit a volunteer application
- Complete a *Safe Environment Training* (SET) foundation course
- Participate in a background check through the submission of their Social Security number
- Complete an annual renewal class between July 1st and December 31st of each year
- And, if required by their parish, participate in a face-to-face interview

There are no exceptions to these requirements. All Vincentians and parish-based Vincentian volunteers must comply with all Diocesan SET requirements before they can attend meetings and/or serve in our works and ministries.

Currently, the *Safe Environment Training* (SET) program for the Diocese of Phoenix is managed through Catholic Mutual and may be accessed by visiting www.phoenix.cmgconnect.org. This site allows participants to create a file, submit an online application, take a foundation and/or renewal classes, and submit Social Security numbers to a third-party vendor for a secured background check. Completing the initial process and approval is required before a member or volunteer is accepted into the Society and/or its works. Regardless of when a participant completes their initial process, their renewal will be due between July 1 and December 31st of each year. Earlier completion deadlines may be set by individual pastors according to the needs of their parish and/or school.



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As Vincentians, we are called to follow the guidelines set out by our Bishop and implemented by his staff. We, as a Society, have a unique and important place in the life of our parishes and our community. Through our work, we encounter children, youth, and vulnerable adults in situations and in ways available to few other individuals and groups within the Church. Our Vincentian vocation calls us to reach out, to serve and to protect those who are at greatest risk of being abused, neglected, or underserved. Fully embracing and participating in the *Safe Environment Training* program is one way that we can help protect others.

Please note that all Safe Environment renewals are due on or before December 31st. If you have not completed your annual renewal, please do so immediately. If you are having difficulty accessing the system or completing your renewal, contact your parish SET coordinator or Shirley Smalley, Diocesan Council President, at msmal14727@aol.com or Mary Ann Hunter, Spirituality and Formation Committee Chair, at Maryannhunter44@gmail.com.



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TOPIC: How Secret Collection Funds Can Be Used

Category: General Information

Review Date: September 2024

Most Vincentians know the history of the black bag/secret collection and understand that such a collection needs to be taken up at all of our conference and council meetings, but many members and even some officers are confused about where those funds should be recorded and how they can be used. There are few if any official documents or articles on this issue, leaving conferences and councils bewildered in regards to the nature of these funds.

If we go to the Rule and the Manual, it is clear that funds collected by the Society belong to and are for the use of the Society regardless of their source. The Manual states, "Donations to Conferences — whether they come from church collections, from the members themselves, from benefactors, or from fundraising efforts — are meant to address today's needs". The phrase "are meant to address today's needs" points to the use of funds for the current needs of the poor. So that brings up the question, if that is true should secret collection funds be used solely for direct or indirect assistance to our neighbors in need?

The answer is yes and no. While once donated, these funds certainly no longer belong to the individual members, they do belong to the conference or council as a collective group. Thus, our secret collection funds can be used to support a broader view of Vincentian activities and works which include works of spirituality, formation and fellowship that enhance the conference members and their vocational call. The main difference between general donor funds and member funds is that the members of a conference or council regularly have in-person opportunities to express their collective intent concerning the use of their donations.

It is important to understand that if secret collection funds are to be spent outside of the general works of the conference, their designated purpose must be articulated in advance. For example, many conferences vote annually on how their secret collection funds can be spent. Some conferences use those funds for festival celebrations, mass intentions, cards and flowers for members during times of illness or the death of a loved one. Some conferences use those funds as donations to a higher council for a special program like our Scholarship Program, Transistional Housing Programs, or Diocesan Council Aid programs. And other conferences use the funds for special retreats, trainings, SVdP assemblies, and other formation activities.

While secret collections funds may be used for more general Vincentian activities, they can never be used to purchase gifts for the clergy, parish staff, or given to charitable groups and activities outside of the Vincentian family. Giving secret collection funds to one of the parish priests to send to his parish overseas or to make a contribution to the parish itself violates the Rule of the Society, (*Rule, Part III, Statute 26*) and is not a choice a conference or council can make. If members want to support the parish or the charitable interests of their pastor or other clergy, they must do that outside of the conference or council collections and/or activities.

The mission of the Society is for its members to grow in holiness through fellowship and service to the poor. Our secret collection funds must always be used to support that mission. Each conference or council must regularly pray and discern how they will use their secret collection funds to promote our essential elements, the poor and one another.



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TOPIC: Weapons Policy

Category: General Information

Review Date: November 2024

Vincentians endeavor to establish relationships based on trust and friendship. Conscious of their own frailty and weakness, their hearts beat with the heartbeat of the poor. (Rule Part I: 1.9)

The SVdP Diocesan Council Board of Phoenix recently approved a Council policy restricting the carrying and use of potentially lethal weapons on Diocesan property and in the operation of their programs. (See attached policy) Technically speaking, this policy applies to all paid staff, Diocesan volunteers, and all Vincentians that serve or participate in the works and activities of the Diocesan Council. This policy is not only a prudent addition to our employment policies and operating protocols; it serves as a glimpse into the very heart of the Society.

The Society of St. Vincent de Paul offers tangible assistance to those in need through person-to-person ministry and works. It is our personalized method of interacting with the vulnerable and needy that makes our work unique and meaningful. When we view the Gospel call to serve others through the eyes of the Society, it is easy to see that what makes our Vincentian work different, meaningful and often life changing is the spirit with which we serve those in need.

We are called to build relationships with those whom we serve through interactions that reflect the dignity and respect we have for each and every person we encounter. We also strive to meet people in-person in places that are safe, comfortable and that convey a sense of family and mutual trust. In today's world, there is much tension and strife. More and more people are finding it hard to trust and believe in the goodness of others even though acts of kindness far outnumber those that are self-centered and destructive.

When we as Vincentians go out in service to the poor, we are called to be a sign of peace, joy, love and mercy. Weapons convey to others a sense of distrust, fear, and hostility. In other words, carrying a lethal weapon while conducting the business of the Society is in direct conflict with the spirit of the Society and gives the poor and vulnerable a very different impression of who and what we are about.

While we always want to convey Christian values and a Christ-like presence, the safety of our members is also equally important. To that point, Vincentians are never encouraged to go into dangerous situations or places. If a location, home or person poses a potential threat, Vincentians should make other arrangements for in-person meetings or refrain from serving certain individuals.

The Society and its members are called to stand in contrast to the values, attitudes and actions of the material world thus allowing others to see the face of Christ in us. We do not need to fall victim of the anger of hostilities of the day. All Vincentians, while conducting the business of the Society, are called to voluntarily comply with this policy because it is the right thing to do.



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Society of St. Vincent de Paul Diocesan Council

513 Policy Regarding Weapons

This policy applies only to employees and volunteers of the Society of St Vincent de Paul. It does not govern third-party security companies or police departments.

Employees and volunteers are prohibited from carrying lethal weapons on Society property, or while conducting Society business, at any time. Lethal weapons include, but are not limited to, firearms of any sort and knives. For individual, personal protection, mace and pepper spray are permitted for all employees and volunteers.

Security officers employed by the Society will be authorized to carry non-lethal weapons when they are on duty. Batons and pepper spray are the approved weapons for security officers. These non-lethal weapons will not be visible unless required. Due to the nature and scope of their job responsibilities, security staff must be fully trained in the proper use of the non-lethal weapons noted above, as well as de-escalation techniques.

Approved by the Diocesan Council Board February 10, 2021



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TOPIC: What Count as a Conference Meeting

Category: General Information

Review Date: October 2024

"The members meet as brothers and sisters with Christ in the midst of them, in Conferences that are genuine communities of faith and love, of prayer and action. Spiritual bonds and friendship between members are essential, as is the common mission to help the poor and marginalized"
Rule: Part 1 3:3

The RULE clearly states that every Conference must meet at least twice a month (Rule: Part 1 3.3.1). The frequency of meetings, however, is not the only requirement of the Society related to conference meetings. For a gathering of Vincentians to constitute a conference meeting, there are certain components that must be present and elements that must be completed.

There are two statutes in Part III of the RULE related to conference meeting requirements.

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. Conference members consistently strive to develop a three-fold relationship with God, the poor, and one another – mutual support and friendship.

Statute 7 further states: A Conference meeting includes the following components:

- **Punctual call to order**
- **Roll call – some method of recording attendance**
- **Opening prayer**
- **Spiritual reading (or meditation)**
- **Approval of minutes of previous meeting**
- **Home visitation reports**
- President's report
- Secretary's report
- **Treasurer's report**
- Committee Reports
- Membership Reports
- Resolutions
- Special Works Report
- **Unfinished Business**
- **New Business**
- **Time and Place of next meeting**
- **Secret collection**
- **Closing prayer**
- **Adjournment**



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NOTE: All components may not be needed at every meeting. For example, there may not be a Special Works category to be discussed throughout the year. Essential elements are bolded in the list above. These elements are to be included as needed. Home visit reports may also be limited to a few representative cases or ones that need approval.

Gathering of members to perform a conference work does not constitute a meeting unless all essential elements **BOLDED** above are present.

It is important that the conference sets a reasonable expectation for attendance, that the meetings are scheduled to accommodate the needs of the majority of members, and that the schedule and agenda is communicated to the conference so that all members are aware of when and where those meetings will take place.

One of the requirements for active (full) membership in the Society is regular attendance at Conference meetings. It should be noted, however, that the Society does not specifically define the words “regular attendance”. This lack of definition is by design and is meant to allow conferences to make that determination themselves. For example, a conference in rural Montana may define regular attendance very differently than a conference in southern California.

In addressing the issue of meeting attendance, the Rule of the Society clearly conveys the idea that if you are committed to being an active Vincentian, you will make every effort to regularly attend your conference meetings thus joining your brother and sister Vincentians in sharing our spirituality, fellowship, and service. This expectation implies more than attendance at a simple majority of your conference meetings.

As Vincentians, we must never lose sight of the fact that the Society does not exist to simply do works of charity. It exists to help our members to grow in holiness, friendship, and service – a blend of all three. And the place where the three basic elements of the Society come together most completely is in our Conference meetings.



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TOPIC: Home Visitation

Category: Home Visits

Review Date: November 2024

"The knowledge of social well-being and of reform is to be learned not from books nor from the public platform, but in climbing the stairs to the poor man's garret, sitting by his bedside, feeling the same cold that pierces him, hearing the secret of his lonely and troubled mind." Frederic Ozanam, Founder of the Society of St. Vincent de Paul)

As can be seen by the above quotation, home visitation has been emphasized as the primary method of our works of charity since our Society was founded in 1833. Unlike fads or trendy activities, this is not something that has faded away or is out of date. A Home Visit is the best way to learn about those whom we are serving and also provides for us to be a servant to the poor. It's a primary source of our spirituality to go to the home rather than ask them to come to us.

One's home is not just a house. A home connotes much more; for it is refuge and castle, as well as place of residence. A home, moreover, tells the story of its occupants. It reveals much that is intimate about those who live there. Under normal conditions, an outsider has no right to enter except by invitation. From this perspective, Vincentians who call on the poor are honored by those who receive them. The welcomed Vincentian is being accorded the status of friend, of privileged guest who is being permitted to share in the inner life of another human being or family.

Why is home visitation so important? Why must we go to them: Wouldn't it be easier and more efficient to ask them to come to us? There are several good reasons to do home visits:

1. Our Vincentian spirituality focuses on our search for Christ in those we encounter. Jesus told us Himself, in Matthew 25, that when He was thirsty, we gave Him drink; when He was hungry, we gave Him food; when He was naked, we clothed Him. We are in search of Christ. And humbly we go to those in need and only in pride do we ask them to come to us.

2. *"You are the servant of the poor . . . They are your masters"* (St. Vincent de Paul). The whole concept of being a servant draws us to do for them rather than ask them to do for us. Our act of going to the poor is a form of sacrifice. We have to give of ourselves, we have to give our own personal time, we have to make an effort to leave our comfortable surroundings

and the activities that we were involved in to go to the suffering Christ. Yes, this is a personal sacrifice; it is an act of love. *"If we wish to become friends with the poor and of the poor, then giving of assistance is not what we are doing – the sharing of ourselves is what we are about".* (Robert Fitzgerald, SVdP Australia, 1988)



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3. Going to the homes of those who request assistance is the best way to learn about them and their circumstances. At a minimum, it verifies that you were given a correct address, but more importantly it helps create a deeper relationship that encourages trust and an open dialogue to actual family needs. *"We shall become acquainted with their sufferings, their hopes, maybe even their vices. We shall know what advice we ought to offer."* (Bailly, 1841)

4. The work of the Society is a work of charity, not a business. We strive for efficacy rather than efficiency. It is the quality of our encounter that has a spiritual impact on us rather than the number of encounters. The home visit provides for this quality while enhancing the dignity and self-respect of those we visit.

5. Travel is not always convenient or possible for the poor. Oftentimes, the only means of transportation for the poor is walking. It is especially at times like this that we build a relationship with the poor by going to them.

Fulton J. Sheen wrote, "The truth is the truth whether everyone believes it or no one believes it." The fact of the matter is that home visits are the best way to learn about the poor and the best way to serve them. We can come up with any number of reasons (excuses) for not doing this. But, the reality is: it is our responsibility as servants to the poor to give them the highest quality, the most efficacious service possible. For it is Christ Himself whom we are serving.

"Let us continue visiting the poor in their homes, the fundamental work of our Society, the work for which our Society exists and which will make it live, which has already brought us such a rich harvest of divine graces and will continue to sanctify us if we remain faithful to its practice . . . Visiting the poor in their homes is then our great, our distinctive business; the business which should occupy the time of the members of the Society of St. Vincent de Paul." (Bailly, 1844)



BRICKS to build the foundation

Topic: Member Reimbursement for Mileage

Category: Home Visit

Review Date: December 2024

“Help us to be generous with our time, our possessions and ourselves in this mission of charity”.

As members of the Society, we repeat these very words in the Opening prayer for our Conference and Council meetings. This concept of sharing ourselves and our possessions is part of the very DNA of Vincentianism. It echoes our commitment to serve the poor for love and for love alone.

In the early days of the Society, Frederick Ozanam addressed the issue of the financial investment of Vincentians in the works of the Society by saying, “It is often the price we are called upon to pay while trying to experience what the poor experience”. Frederick, Vincent, Louise and Rosalee all felt that until we live like the poor, we can never truly understand their needs.

While most Vincentian do not live in real poverty, our willingness to bear the cost of naturally incurring expenses related to and with serving and visiting the poor can serve as a reminder of the sacrifices that the poor make each and every day.

It is clear that the Society strictly prohibits Vincentians from personally providing goods or financial support to the neighbors we serve, however, our Rule and mission do encourage us to donate to Secret collections, the Society and to pay for our own expenses. We must remember that we are called to serve the poor without compensation. Our time, our gas, and the wear-and-tear on our vehicles are part of what we offer to the Lord for all the wondrous things He has given us. Our offerings and sacrifices are offerings of gratitude.

Although paying for your own gas for Vincentian work, Council activities, and home visits is the preferred protocol, we must also be mindful that Conferences may decide to reimburse members for their mileage. In some of our rural areas, Vincentians may need to drive greater distances to make visits than in the metropolitan areas. It is not uncommon for Vincentians in our outlying Conferences to need to drive more than fifty miles round trip to make just one home visit. In those cases, reimbursement may be an appropriate option.

If a Conference decides to assist Vincentians with compensation for gas, it must be a reimbursement not a pay forward policy. The Conference must decide as a group if they are reimbursing for mileage, for what events and activities, and at what rate. The rate needs to be set in advance and should be standard regardless of the type of vehicle being used. The Conference needs to keep in mind that the standard reimbursement rate for mileage for volunteers as stated by the IRS is \$.14 a mile. While that amount may be low, most charitable organizations reimburse their employees for mileage at approximately \$.65 a mile.

If the cost of gas is an issue for members, the Conference can be creative. As Vincent believed love is creative to infinity and, as Vincentians, we are a resourceful people and we can find solutions to the challenges we face. The Conference can partner members who cannot afford to pay for gas with those who can. The Conference can look at grouping home visits by area thus reducing the amount of gas that is actually needed. Each Conference must make its own decision based on the distances being traveled and the financial resources of their members.

We must always remember that **Home Visits** are at the heart of the Society and its works. These visits should not be limited or eliminated simply because members cannot afford to pay for gas. In order to save money and time, the poor should never be required to come to us. If we as members cannot afford gas to visit those in need, how can we expect the poor to pay for gas to come to us?

God is asking us as Vincentians to use our hands, feet and our resources to help those in need. We were called and we responded to that call to be Vincentians. Routinely we ask God to help us to be generous with our time, our possessions and ourselves. May we honor that request and trust in God’s Divine Providence knowing that He will help us to do just that.



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TOPIC: Privacy and Confidentiality Policy

Category: Home Visits

Review Date: October 2024

“Vincentians serve the poor cheerfully, listening to them and respecting their wishes, helping them to feel and recover their own dignity, for we are all created in God’s image. In the poor, they see the suffering Christ.” (Rule: Part I: 1.1.8)

Because respect and dignity for the poor are core values of the Society, ***“Members observe the utmost confidentiality in the provision of material and other types of support”. (Rule: Part I: 1.1.8).***

The Manual of the Society goes on to explain that all individuals receiving services and/or support from Vincentians should be advised of our privacy policy of the Council. Because respect for the dignity of each and every person is an integral part of the Society, Vincentians must hold as sacred the stories and information that those we serve share with us.

“Confidentiality, based on the individual’s right to privacy, has both legal and ethical implications. Disclosures made to a Vincentian member and Conference by an individual or family may be revealed to others only under specified conditions, and solely for the purpose of providing help”. (Chapter 2, Page 23, of the Manual)

The Confidentiality Policy of the Diocesan Council of Phoenix shall be as follows:

1. All Conferences must incorporate into their written Conference Guidelines a statement acknowledging the confidentiality policy of the Diocesan Council.
2. Basic and pertinent neighbor information shall be recorded in ServWare.
The Conference computer will be password protected and shall be secured. All inactive files, files where there is no activity for a period of 3 or more years, may be purged. Only basic client and service information shall be recorded.
3. Information concerning those we serve may be shared without consent only within the Vincentian family. Sharing information outside the Vincentian family, including with the Pastor, must be done with great care and except under extraordinary circumstances only with the consent of those we serve. See Release of Information Protocol list below for appropriate level of consent.
4. Those being served or seeking service and/or support shall be advised of the protocols and privacy policies of the Council and how their personal information will be safeguarded and used.



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Release of Information Protocol

Type of permission required

Circumstances

Verbal permission:

General types of assistance such as food, thrift store, vouchers, referrals or assistance with gasoline or medication purchases.

Release of Confidential Information:

Simple payments for things such as utilities or rent
unless the company receiving payment requires a more formal written release.

Situations that are complicated or require advocacy interactions in which personal information will be shared. Such releases are interaction specific and should apply only to a specific action and limited time

[Consent Form ENG/SP](#)

Photo & Media Release Form:

Situations where photos, videos or stories are used for publication. These forms are available through the Community Relations office at the Dan O'Meara Center. Media items to be distributed outside of your Conference or parish, need to be coordinated through the Marketing Department office.

No permission or release required:

Situations where the person poses a genuine threat to themselves or others.

Vincentians may not:

Share personal information about those receiving or seeking service with their own family or friends or persons outside the Vincentian family.

Release information to any type of media sources. This is role of the President.

Share individual service information with outside agencies or groups such as giving another social service group a list of clients and a record of past services they have received.

Share information about specific individuals or families receiving service with another individual or family seeking or receiving service.

Call or notify other groups or agencies about individual service history solely for the purpose of excluding a person from future services.



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TOPIC :Transporting Our Neighbors in Need

Category: Home Visit

Review Date: November 2024

Transporting Our Neighbors in Need

No act of charity is foreign to the Society. It includes any form of help that alleviates suffering or deprivation and promotes human dignity and personal integrity in all their dimensions. (Part I: 1.3)

From its earliest days, the Society held that “no work of charity is foreign to the Society.” With this foundational belief at the forefront of our mission, it is only logical that many of our neighbors in need often require assistance with transportation. So, questions often arise concerning the feasibility and requirements for transporting those whom we serve.

While Conference and Council guidelines and decisions determine if neighbors in need can be transported by Vincentians from that group, there are some universal requirements that must be met. First and foremost, any direct contact with those whom we serve including transporting neighbors must be done by two Vincentians. Secondly, minors may not be transported unless they are accompanied by a parent or guardian. Next, the driver must be licensed, insured and the owner of the vehicle being used to transport our neighbors.

Vincentians must also remember that Federal law prohibits the transportation of individuals across state lines who do not have the proper documentation regarding citizenship. And finally, it is required that a Transportation Release of Liability waiver be signed by all adults being transported.

When deciding whether or not to allow members to transport neighbors, a Conference or Council should consider both safety and liability issues. The general rule for auto and liability insurance is that the coverage for the vehicle being driven is always in place. So, for a personal car, the Vincentian’s own policy would be primary. The SVdP Phoenix Diocesan Council’s auto coverage would only come into play if and when damages or awards exceeded the owner’s coverage. The Diocesan Council’s general liability coverage could be applicable depending on the circumstances of the case.

Conferences and Councils should first consider all the possible alternatives regarding transportation of neighbors including gas vouchers, bus tickets, taxi services, medical and elder services, and private transportation companies including UBER and LYFT before deciding to provide direct transportation services to our neighbors. Some of transportation companies will allow a Conference or Council to set up and pay for rides electronically.

Transportation can be a valuable and needed resource for many of the individuals and families we serve, so Conferences and Councils need to make decisions about how best to provide this service while keeping in mind personal and corporate liability, safety and cost. Even if Conference or Council guidelines allow for private transportation of neighbors by two Vincentians, each member has the right to make their own decision about providing such services. As St. Vincent de Paul said, “Love is inventive to infinity” and there are many viable transportation options available for us to use to meet the transportation needs of those whom we serve.

If your conference decides to provide transportation services please have the Neighbor complete the Transportation Waiver Form [Transportation Waiver Form](#)



BRICKS to build the foundation

Topic: Two by Two

Category: Home Visits

Review Date: November 2024

Two by Two

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. (Rule Part III: Statute 8)

Have you ever wondered why Vincentians go out in pairs as opposed to going out on calls or visits alone? On the surface the answer to this question may appear simple. As Vincentians, we know that we never go out alone for a variety of safety and legal reasons. Each of us can logically deduce that there is more safety in numbers and protection in having a witness, thus going in pairs is a reasonable safety precaution to take.

While safety and protection concerns are strong supportive reasons for requiring Vincentians to work only in pairs, neither appears to have influenced Frederick Ozanam and the founding members of our Society. From the very beginnings of our organization, Vincentians have served in teams of two or more, but why?

The first members of our Society had a strong sense that it was necessary to go out to spread the Gospel just as Jesus had sent out his apostles two by two. During Ozanam's day, many charitable groups including the Daughters of Charity went out into the streets and worked among the poor alone. This begs the question of why the Society placed so much value on going out two by two.

If we look at the concept of two by two in the Bible, we find this practice rich in meaning and practice. This scriptural mandate served as the model for the first Conference of Charity and helps the Society define who we are and what we do. The number two conveys and articulates community. When we work or minister alone, we are tempted to see that work as something we own. When we enter into the community of two or more, we experience a deep sense that our work represents something bigger than ourselves.

As Vincentian teams, we are representatives of the Society and a symbol of God's abiding love for all. The work is not about us. It is about bringing the Gospel to life by en fleshing the Good News. The money is not our money. The glory is not our glory. The work is the work of our Conference, not of our hands alone.

Our Rule directs us as Vincentians to minister in twos. Nowhere in the Rule of the Society does it say that there are exceptions to the two-by-two requirement. We do home visits in pairs. We deliver food in pairs. We meet our families to pay their rent in pairs. We visit institutions in pairs. We go together and by doing so we bring God's love to others in a way that is truly unique to our Vincentian mission. Being a Vincentian means that we fully consent to living and working through the Body of Christ; a Body that is always and forever based in a community of two or more joined together in mission, love, and service.

As Vincentians, let us remember the spiritual value of community and that we, like the apostles, are being sent into the world two by two to spread the Good News of God's love to all people.

"For where two or three are gathered in my name there I am in the midst of them". Matthew 18: 20



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TOPIC: What Conferences Can Do When They Have No Money

CATEGORY: Home Visits

Review Date: November 2024

As Vincentians, we begin each and every meeting by praying these words: "Lord Jesus ... make us responsive to seek and find the forgotten, the suffering or the deprived so that we may bring them Your love."

While our Vincentian mission and prayer clearly articulate that as member of the Society we are called to bring God's love to those in need, we are often at a loss and close our doors if and when our bank balances and pantries are depleted. We find it difficult if not impossible to imagine that we can be of assistance outside of giving food, clothing, furniture and/or financial assistance, but nothing can be farther from the truth.

If we look at Jesus as our model, we see that our Lord helped hundreds of people yet not one story in the New Testament indicates that he gave anyone a single penny. Love and personal intimacy were at the core of Jesus' public life and mission and should be the central focus of our ministry.

Conferences can always look at ways to offer alternative programs, do advocacy, make referrals, enter into collaborative service ventures, and even come up with creative ways to secure additional funds, but none of these things is as valuable as the gift of ourselves. During difficult times, we are called to do more, not less home visits. According to the Rule, "Vincentians should never forget that giving love, talents and time is more important than giving money."

The Vincentian way is to talk to every person who calls us and whenever possible to schedule a home visit. Home visits give us unique insights into the problems and struggles of those we serve. As we talk in person with those in need, opportunities to work together arise and important goals and strategies emerge. Face to face visits in a person's home allows us to discern when there is a reluctance to share. After praying together and talking we can create an atmosphere of understanding and open the exchange to reveal the true depth of the challenges being faced. In the give and take of our conversations, we learn from one another and share each other's burdens as true friends in Christ.

In addition to continuing home visits, there are numerous ways that conferences can help serve the poor that require little or any funds or supplies. Some of these services include:

- 1) Develop and expand collaborative relationships with other churches and agencies to increase collective funding to meet financial needs of our families.
- 2) Work with local landlords and utility companies to set up payment plans that will allow the conference and our families to pay over an extended period of time.
- 3) Schedule a community garage sale and rent spaces to individuals and give spaces to families in need. Money collected from space rentals can go into conference funds and items not sold can be immediately donated to our SVdP Thrift stores. A truck can be scheduled in advance.
- 4) Collect and distribute coupons, gift cards, and reward certificates to families in need. Many stores and companies now offer incentive programs that can benefit those we serve by giving them free products or significant discounts.



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- 5) Think about unique ways to do fundraising within your parish or community. Search for small grants or speak to local civic organizations and ask them to make a donation to your conference.
- 6) Refer to budgeting classes and/or host speakers who can guide individuals through service program applications or help families start their own small business.
- 7) Refer to agencies that provide job development classes where individuals can get assistance with resume writing, practice interviewing skills and network to obtain employment.
- 8) Refer to local job fair where companies seeking employees can interact with potential employees.
- 9) Refer to Business Exposition where independent contractors and small businesses can publicize their company and services.
- 10) Place a Job Posting area on the parish web site where potential employers and employees can exchange basic contact and job information

Above all, as Vincentians, we must not despair for we are a people of hope. We are called to be diligent, to serve according to our vocation and to trust in the Providence of God. The families we serve need our hope, our resilience and our confidence. In troubled times, it is easy to find those who have given up or feel defeated, but it is a true gift to find people who are willing to smile, to move forward and to take the time to listen and to care. For many, we are those people.

Prayer, discernment, creativity and a willingness to break a sweat are all the tools we really need to face exigent times, low bank balances, empty shelves and escalating financial requests.

We must never lose sight of the fact that we are called to love and serve the poor not to just pay their bills or feed their families. Vincentians draw nearer to Christ, serving Him in the poor and one another. "They grow more perfect in love by expressing compassionate and tender love to the poor and one another." (Rule: Part 1, Article 2:2)

As long as we have ourselves, our love, our compassion and our hope to offer those in need, we can truthfully say our coffers overflow with blessings that must be shared.