

## ***Common Vincentian Questions and Answers***

The following Questions and Answers were published in Frederic's E-Gazette. This file is a repository of those items. There is no particular sequence to the items or categorization.

### **Can SVdP funds be used to purchase gifts for children? For example: to purchase Christmas gifts or Easter baskets, etc. This would not be considered a necessity.**

Part I of Rule, 3.14 - decisions regarding money and property should be made in light of Gospel and Vincentian Values. Manual, page 24 - The Conference determines what charitable works and services it will undertake. Also refer to Manual page 26 titled Funds of the Conference and Conference Bylaws Article 12. This is a matter for the Conference to decide. Once decided, all members must comply with the decision whether they agree or not.

### **What is the process for resolving problems at a Conference or Council?**

This falls under the principle of subsidiarity. All issues or problems should be solved at the lowest level. Conference member notifies the Conference President of the matter for response or resolution. If necessary, the Conference President notifies the next higher Council President of the matter for a response or resolution. Council President, if necessary, notifies the Regional Vice-President of the matter for a response or resolution. Regional Vice President, if necessary, notifies the National President for a response or resolution.

### **What should a Conference do when they have excess funds? When does the consideration of hoarding come into play?**

Society funds are derived from various sources. Conferences should be aware of what is expected of SVdP as custodians of funds given for the poor. The question of accumulation of funds is a sensitive issue. Some feel they should spend all they receive. Some feel they need to have funds set aside for special cases. Operating an active Conference with a reasonable bank account is not hoarding but, in some cases, may be prudent. A balance in the area of six month's to one year's expenditures may be prudent if the Conference has some fixed operational costs, such as a monthly rent payment to the parish for the use of the pantry/office. Conferences with more funds than this should look at ways to spend those funds appropriately: twinning with Conferences in poorer areas, planning special works, etc. Hoarding comes into play when a decision is made to keep money in the bank rather than use it to help someone in need. We should always work with the goal spending down our funds to zero in order to help those in need – after all, that's what the funds were given to us for.

### **What should a Council do when they have excess funds? When does the consideration of hoarding come into play?**

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### **Is there anything in the Rule which covers discussions of clients via email? What about sending mail to spouses that are not both Vincentians but share an email address?**

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Confidentiality is highly emphasized within the Society. The Rule does not address technology and it shouldn't since technology changes and improves constantly. The fact is that information about those we serve and who they are can only be shared among Vincentians unless specific written and signed authorization is given by the client. So, email may be used to discuss information about clients as long as that information is protected and not allowed to be seen by those who are not Vincentians. That email should not be forwarded to non-Vincentians and, if printed, should not be allowed to be seen by non-Vincentians. If you cannot ensure this, then don't use email. This concept holds true for Conference minutes, lists of active clients, treasurer reports, etc. A shared email address may be used as long as all parties to that shared email understand and are willing to comply with our confidentiality standards.

### **Is it a breach of confidentiality to provide all Conference Members with a working list of current case numbers with full names of clients and the date the case was opened?**

Confidentiality is highly emphasized within the Society. Reports may be used to reflect information about clients as long as that information is protected and not allowed to be seen by those who are not Vincentians. If you cannot ensure this, then don't use that method. This concept holds true for Conference minutes, lists of active clients, treasurer reports, etc.

### **If something is not explicitly stated in the Rule, are we to assume we can use our good judgment to resolve the question?**

In Part II of the Rule, Article 7.4 of the Rule states: *Any matter that is not specifically governed by any parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General.* We have the "Rule." We also have the Manual, by-laws, local standards approved by Conferences and Councils. Sometimes following simple logic and common sense does not correspond with Vincentian spirit. If the topic is not covered by the standards shown above, seek advice from Council, regional and National sources.

### **We designated our Pastor to be our Conference Spiritual Advisor but he is unable to attend every meeting. What should we do?**

In Part I of the Rule, Article 3.13: *Members of the Society are united in the same spirit of poverty and sharing. They encourage one another to live a profound spiritual life and spirit of prayer. For this purpose, the role of Spiritual Advisor is very important.* The value of having a Spiritual Advisor present for the entire meeting is that they are the listening ear considering ways to imbue the Conference, client call or meeting with Vincentian spirituality. They become the person who guides the Conference decisions in light of Gospel Values and our Mission. We don't want to discount the Pastor, but he is not necessarily the only one who can fulfill this role. One response to ensure you have an active Spiritual Advisor but still include the Pastor is to designate TWO Spiritual Advisors. That way, Pastor can come when he is available yet you also have a designated person to lead prayers, facilitate the spiritual reflection, listen throughout the meeting and close the meeting with prayer.

### **There is a non-SVdP agency in our community that helps with utilities, rent, food and other assistance. They are very helpful to our Conference. We would like to give them a donation to help them out. We have extra funds in our account. Is this permissible?**

The Rule is very specific. The resources of the Society must be used by our members for their works of charity and not given to other organizations -- no matter how good the cause. We do not do checkbook charity -- we are to be involved in person-to-person works.

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### **I have found a very talented person in the parish who is willing to be my Conference Treasurer. I am going to appoint him. Is this permissible?**

The Rule is very specific. Only Full (Active) members of a Conference are eligible to be Officers. In order to be a Full (Active) member, he/she must be Catholic, attend meetings regularly and be actively involved in the life of the Conference. This process takes a while. You cannot recruit a totally new person to be an officer.

### **We are getting ready for a small fund-raising campaign and in our advertising we want to use the SVdP Logo in a special way. What restrictions are there on its use?**

In 2006, the National Council passed a resolution assigning the Chief Executive Officer with the task of approving special uses of the SVdP Logo. There is also a document that comes from the National Council Office entitled "Identity Manual" which describes the preferred uses and color for the Logo. The recommendation is to design how the logo will be used and submit it to the Chief Executive Officer for review and approval. There should not be any significant delay of the project.

### **Where exactly does it say that our pastor cannot be an officer in our Conference?**

In Part III of the Rule, Statute 15: Priests and deacons are not eligible to be elected or appointed in the Society to any office outside their spiritual role.

### **I have been told that our Pastor cannot be a signor on our account. Where does it say that?**

This is not explicit in the Rule. It is part of our tradition ensuring that only lay members of the Society have control of its funds and operations. In Part II of the Rule, Statute 7.4: Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition. Part III of the Rule, Statute 15 states: Priests and deacons are not eligible to be elected or appointed in the Society to any office outside their spiritual role. Although Statute 15 does not explicitly address signers on accounts, it is an example of our tradition. It is addressed on page 26 in the Manual under "Funds of the Conference."

### **We just recently voted on a new set of bylaws. When exactly do those bylaws go into effect?**

Unless there is some specification defined in the vote, the bylaws go into effect immediately.

### **I am struggling with a decision made by our Conference. I disagree with it. How do I deal with this?**

The decisions of a Conference or Council are made by the Conference or Council as a whole either through consensus or by a vote. Once the decision is made, all members must abide by the decision whether they agree with it or not.

### **Our Conference has been struggling for a long time to get a regular Spiritual Advisor. One of our long time members volunteered, but he is the husband of one of our Active members and is non-Catholic. He is a very spiritual person. Is this okay?**

No. Article 6.5 of Part I of the Rule states: The Catholic beliefs and ethos of the Society of St. Vincent de Paul must be preserved. The President, Vice-President and Spiritual Advisor should, therefore, be Roman Catholic.

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**I am bothered by something that happens at our Conference meetings fairly regularly. We have a lot of parishioners who have shown interest in the Society and it is pretty common to find one or two new faces at most of our meetings. During the meeting, they are allowed to vote on issues just like everyone else. Our President says he wants them to feel welcome and part of the group. Is this a good practice?**

The answer is "no." We welcome new people to be part of the Society, but there is a process that should be followed. In most all versions of the Rule/Manual of the Society, there has been a promoted procedure for bringing new members into the Society. This procedure includes introduction, training, active participation in works, discernment by the candidate and ultimate approval by the Conference. This process works and should not be short cut in order to bring more people into the Society. The decisions of the Conference should be made by Active (Full) Members only.

**How long do we have to keep our Conference records?**

Generally speaking, a good rule of thumb is seven (7) years. On page 32 of the Manual, there is a complete list by type of record of the numbers of years you are required to maintain them. Official records are maintained by both the Secretary and the Treasurer. All officers should be aware of the retention schedule.

**Why do Conferences have to meet so often?**

Part I of the Rule, Article 3.3.1 states: Conferences meet regularly and consistently, usually weekly, but at least every fortnight (twice a month). That's the Rule. But there are good reasons behind every Rule.

- 1) The Conference meeting is the only time and place when all three objectives of the Society (call to holiness, fellowship and service) come together at the same time.
- 2) Many times, those we serve are waiting for a Conference decision about the help they will receive -- don't make them wait long.
- 3) If meetings were held monthly or less often, the element of fellowship cannot be fulfilled, since on the average, each member may miss as many as three meetings during the year.
- 4) Teamwork and friendship are strengthened by meeting often.
- 5) Maintaining the focus on our Vincentian spirituality is more difficult the less often you meet.

**A man gave our Conference \$1,000 and told us that he wanted us to give his daughter the money, but he didn't want her to know where it came from. Can we do this?**

The basic answer is "no." We should not accept these types of donations. This is more than a restricted donation. Restricted donations are specified for some general category of assistance, not for a particular person. However, if the Conference had already identified this person to be helped and was contacting the family for additional assistance for her and the father offered a \$1,000, then this would be acceptable since this was a work initiated by the Conference.

**One of our Conference members is upset about rules and "all of the paperwork." She says she joined the Conference to help people, not to fill out paperwork. What can I tell her?**

First, remind her that the funds and other resources she is working with belong to the Conference -- not to her -- so she is responsible to show good stewardship of those resources. Second, the paperwork requirement is minimal and reasonable. Next, rules maintain order among a group and also define parameters under which everyone can work. The Society exists

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for the member -- not for the person in need. Our goal is holiness and our works of service help us to attain that -- service in not what we are about. And last, when a person joins the Society, they agree to follow the Society's rules and procedures. If those become too burdensome, then maybe the member should withdraw. An unhappy attitude will impact the service provided to those in need.

### **What is the difference between twinning and co-pays?**

There seems to be a basic misunderstanding of what twinning is. When it comes to SVdP use of funds, twinning is the process in which a Council or Conference gives money to another Council or Conference for them to use as they see fit. This does not include solidarity contributions. It can be one time or multiple times. For example, Conference A is fairly well off financially and knows that Conference B is poor and has a lot of people asking for assistance. Conference A chooses to send Conference B \$500.00 for them to use as needed. This is twinning. This would be recorded financially under category 8 (A or B) as domestic or international twinning.

Co-pays are different. A co-pay occurs when Conference A chooses to help Conference B pay a specific bill for a person or family. For example, Conference B wants to pay the \$600.00 rent for John Smith's family of four but can only come up with \$300.00. They ask Conference A for \$300.00 to help on this case. Conference A sends them a check for \$300.00 and the rent is paid. Both Conference A and Conference B record the transaction under category 6 (Those We Serve), establish a case record for the Smith family, and record the effort as helping four people with rent. Conference B would record one Home Visit and Conference A would record an "Other In-Person Visit" or "Telephone Only Contact."

Co-pays are also valid if you are sharing the cost of aid for a person or family with another organization, like the Community Action Agency (CAA). Conference A can validly give funds to CAA to help on a specific bill and record it as above: Those We Serve, case record, and number of people served. This does not violate the prohibition against giving funds to another organization, since the funds are intended to help a specific person or family rather than help the other organization.

The distinction between twinning and co-pays is not defined in the Rule, Manual, Bylaws or International Twinning Manual. The distinction comes from experience. Conferences want to assist other Conferences when the need is there. However, Conferences also want to have credit for the people they assist and, when they help another Conference to pay a bill for a family, they should be able to record that payment properly in their records as assistance to a person or family in need. Co-pay is not a "Vincentian term" as is "twinning." It is a term that describes a transaction. If a Conference does not care about getting credit for helping people, then they can treat the contribution to the other Conference as twinning. But if they want to get credit, they must know the difference and record it properly.

### **Our Conference purchases food at a good price from our local food bank. The food bank requires that we provide them a list of everyone that we give food to. Is this a violation of confidentiality?**

Yes, it is a violation, unless you received authorization from those to whom you give food to share their information with other organizations. If you stay with the food bank and someone chooses not to authorize this sharing of information, you may have to refuse to give food from the food bank to them. They could be given food you purchase or get from other sources.

### **I know that Conferences are expected to follow federal, state and local laws but I can't find in the Rule where it states that.**

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It is not stated in the Rule. However, it is in the Nationally Approved Bylaws for Conferences in Article 2. You will also find this in the Manual on Page 30 under two sections: "Legal and Financial Realities" and Tax Laws and Financial Records."

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

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

***"Therefore be it Resolved*** that the National Board of Directors recommends that the National Council require that:

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

### **Where in the Rule is it stated that Conferences need to stay within the boundaries of their own parish when giving assistance? I looked but could not find anything.**

This is not in the Rule. The Society exists in only about ¼ of the parishes in the United States; so, our Conferences often find themselves assisting people outside of their parish boundaries. The rules associated with staying in the parish boundaries are normally established formally and informally within a District or Diocesan Council. Typically, Conferences should not help in an area covered by another Conference without the other Conference's knowledge and approval. There has been a long standing resolution by the National Council that prevents Councils/ Conferences from fundraising within the boundaries of other Councils/ Conferences without their approval.

**Mike, reference your comment about spending our funds down to zero. I believe it becomes very misleading to some readers of the E-Gazette. If we are being prudent we should save to 6 months. Okay, less prudent it says somewhere in the Rule or Manual, 3 months. Either or, spending down to zero is not being prudent, in the event of emergency situations. When I inform members/Vincentians in my Conference about being prudent, it becomes a good means of managing our funds. But when they read about spending our funds to zero, I believe it is contrary to being prudent. Conceptually it sounds charitable, but very misleading with regard to any funds management. If you would in a future Gazette, please clarify.**

I understand your reasoning, but you have to look at it from a realistic standpoint. Unless your Conference has regular, fixed expenses, then there is no need to have a reserve. For example, some Conferences are asked by their parish to pay \$xxx each month to cover utilities for the space they use for a pantry. Having a six month reserve to cover that is reasonable. But if you don't have fixed expenses, then you are likely going to turn people away today in order to have money to help people in the future. Or, you may choose to help people in a lesser way today in order to help people in the future. The expression is "robbing Peter to pay Paul." If your Conference is fortunate enough to have more money than you need, then you are in a not-so-

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common position and can afford to put some money aside. Our role is to help the people who come to us in the best way possible and sometimes that means bringing the balance down to zero. God will provide. I have seen it happen over and over and over again.

**We are going to have an election for President of our Conference in the near future. I looked in the Rule and could not find the process for election. Where will I find this?**

The process for election of a President is very important; don't make assumptions or take shortcuts. The actual process is best outlined in a document that can be found on our website [www.svdpusa.org](http://www.svdpusa.org). You will need to click on "SVdP Members" at the top of the page. When you get to the members home page, you will find a tab at the top of the page for "Documents." When you go to that tab, it will bring down a menu. Click on "Council/Conference." That will bring you to a webpage with lots of documents. There are three documents that describe the election processes: *Election Process – Archdiocesan Council*, *Election Process – Conference*, and *Election Process – District Council*. You should download and follow the process in the one for the Conference.

**The topic of an annual Conference audit arose at our Conference meeting last week, and it seems like a good idea. But, instead of reinventing the wheel, I'd like to find out how it was done elsewhere. Are there guidelines for how it should be done, or who should do it?**

On our website, [www.svdpusa.org](http://www.svdpusa.org), go to the "SVdP Members" page. Under the "Membership" tab, you will find an item titled "Best Practices." Click on that and, when you get to the Best Practices page, click on the category "Conference Concerns." Among the items listed there, you will find "Description of Audit Process for Conferences." That is a sample process that works.

**I was just reading your response in the E-Gazette and I'm a bit confused. Can you please explain what you mean by, "The Society exists for the member -- not for the person in need. Our goal is holiness and our works of service help us to attain that -- service in not what we are about."**

There are three objectives of the Society (this is in the Rule): Growth in holiness, fellowship and service. The primary objective of the Society is for each member to grow closer to God. That is why we have so much emphasis in the Society on spirituality. That is why every Conference is supposed to have an active Spiritual Advisor. That is why one third of every Conference meeting is supposed to be devoted to spirituality. That is why we have prayers at the beginning and end of each meeting and gathering. That is why we promote for our members to pray before and after their encounters with those we serve. That is why we have spiritual commissioning ceremonies for various roles and activities in the Society. Yes, our main work is service to those in need, but even that is to help us grow in holiness. The Ozanam Orientation and Serving in Hope are the primary training programs for Vincentians. Both emphasize the importance of spirituality. However, this is what we say in our training. We are not strictly a spiritual organization, we are not strictly a social organization, and we are not strictly a service organization. There must be a balance between the three objectives of the Society.

**One of our Conference members insists on going on calls by himself. He always comes up with a reason why he had to go alone. I believe he just doesn't want to be bothered with someone to tag along and question his decisions. What can we do to change this?**

The simplest thing to do is to just remove him from the roster of the home visit teams. That is the easy thing but not the best solution. It would be great to convince him to work with others.

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You should explain to him how he places himself in danger by working alone. He places himself at risk of accusations of impropriety, sexual harassment, etc. He places the Conference at risk with the same accusations. You can explain that our Lord sent his disciples out in pairs. You can tell him that no work is so absolutely essential that it couldn't wait the short time necessary to find someone to go with him. But it all boils down to telling him to follow the way of the Society or, if that is too much of a burden, find another ministry.

**I just received the latest call to action. It seems to me that there is something improper about what we are doing. To be tax-exempt under section 501(c)(3) of the Internal Revenue Code, an organization must be organized and operated exclusively for exempt purposes set forth in section 501(c)(3), and none of its earnings may inure to any private shareholder or individual. In addition, it may not be an action organization, i.e., it may not attempt to influence legislation as a substantial part of its activities and it may not participate in any campaign activity for or against political candidates. Please explain how this lobbying activity does not run afoul of the Society's charitable purpose under Section 501(c)(3).**

Thank you for your comments. Please understand that the Society makes every attempt to comply with all laws and regulations that pertain to it. In this particular case, you misinterpreted the language: "it may not attempt to influence legislation as a substantial part of its activities and it may not participate in any campaign activity for or against political candidates." The advocacy/lobbying we do is not "a substantial part of our activities;" it is a very small part of what we do. And, our lobbying is not on behalf of or against particular "candidates;" it is related to particular legislation, which is permitted. If you will look closely at the emails we send in this respect, you will see that we are asking our members to take action related to specific legislation.

**Check signing: is it necessary to have 2 signatures on each check? Our Conference has had two signatures, the treasurer and either one of the other officers, or the Pastor (rarely). We are now wondering if this is because of the Rule, or was it just a precaution of the founding members?**

First, the requirement of two signatures on a check is a good practice but it is not a requirement of the Society. However, you must understand that this is not verified by the bank when checks are processed. The only time verification is made is when there is a question related to a particular check. The check may even have printed on it that two signatures are required, but no one is going to verify valid signatures unless something is questioned about the check. So, in reality, the two signatures is primarily a procedural requirement. Second, you mention the possibility of having the pastor sign the check (rarely). It is contrary to the Society to have a priest or deacon as a signor on a Conference bank account.

**I'm treasurer of our local conference. And, the question comes up as to how much paperwork is required by the treasurer. I keep a running balance in the checkbook including regular and "electronic" checks and deposits. Each entry I post on a sheet like required on the Quarterly and Annual Reports. My president has requested that I duplicate this information on a spreadsheet and distribute that at each meeting. I refused, but my president said it would be OK if I just copied my checkbook and distributed that. My question: Is it necessary to provide data in this manner rather than just the summary sheet with items categorized like the Quarterly and Annual Reports?**

Generally speaking, providing a summary sheet of the finances is common in many Conferences. However, I have been a member of several Conferences over the years in different



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parts of the country. In many of those Conferences, the Treasurer provides a detailed report listing each check written. The income is more summary information. Members of the Conference have a right to know how the resources are used. In some Conference structures, the Treasurer only writes checks specifically authorized during a Conference meeting. In some Conferences, members carry blank checks and issue them as needed (not the recommended practice). In many Conferences, home visit teams contact the Treasurer and authorize the Treasurer to issue certain checks. The full picture of expenditures is not available to the members except through the Treasurer's report at the meeting. The request from the President is not unreasonable. However, be sure to remind members regularly that this is confidential information and should be disposed of properly if not needed.

### **I have found a very talented person in my parish who is willing to be my Council Treasurer. He said he will join a Conference. I am going to appoint him. Is this permissible?**

The Rule is very specific. Only Full (Active) members of a Conference or Council are eligible to be Officers. In order to be a Full (Active) member, he/she must be Catholic, attend meetings regularly and be actively involved in the life of the Conference. This process takes a while. You cannot recruit a totally new person to be a Council officer. You are better off finding someone else who can fulfill the role now or just keep the position open until he is eligible.

### **Could you please send us instructions on how to twin with another SVdP Conference? We want to help out another conference in a poor area of the city.**

The National Council office handles International Twinning. Twinning with a Conference in the U.S. (known as Domestic Twinning) is handled informally. You simply contact them and send them the funds you intend. You should expect a letter of thank you and an explanation of how the funds will be used. It is good to let your Council know that you have started a twinning relationship. If you are interested in International Twinning, contact Maria Villa-Garcia at [mvilla-garcia@svdpusa.org](mailto:mvilla-garcia@svdpusa.org).

### **One of our Conference members is going through a personal financial crisis. We just recently received a very large donation. He is asking to borrow money from the Conference until he gets back on his feet. Can we do this?**

Every Conference should be willing to assist people in need even if that person is one of the members. However, there are special considerations:

- 1) No Conference should help one of its own members more than it would help anyone else coming for assistance.
- 2) The assistance should be given in the same manner as in helping others.
- 3) The particular case should be discussed at the Conference meeting without that member present.
- 4) Conferences generally don't loan money, they give gifts to those in need.
- 5) To avoid future complications, the member in need may have to withdraw from the Conference until the crisis is over.

### **This rule about meeting often -- is it something just here in our area or is it required everywhere?**

The requirement is in our international rule. On our international website ([www.ssvpglobal.org](http://www.ssvpglobal.org)), you will find reference to a document called "The Rule and Statutes (Commented)". In the comments on Article 3.3.1, it states: "Friends wish to see each other frequently; the poor need us urgently. This article says that we should meet at least once a fortnight. But we strongly recommend that, whenever possible, a week would be the longest gap

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before meeting to talk about all issues -- concerning the poor, and concerning God. 'Isolated virtues wither easily; together and intertwined they form immortal wreaths' (Blessed Frederic Ozanam, letter from Lyon to the Conferences of Paris, 1838)."

### **Our Conference has just approved a set of bylaws. Now that they are approved, what is the next step?**

The bylaws you approved should correspond to the bylaws for Conferences approved by the National Council. Be sure that you have a record of the approval and copy of the bylaws in your Conference minutes. Next, send a copy of the bylaws through the organization chart to District and Diocesan Councils for their approval, recording and filing. The District and Diocesan Councils should also record their approvals in their minutes.

### **Who are the voting members of the National Council?**

The definition will be found in the National Council Bylaws; but briefly, they include the National President and one voting member from each diocese in which there is a St. Vincent de Paul (Arch)diocesan or District Council. Additionally, the voting member needs to be from an "instituted" Council. The way the voting member is identified is relatively simple. The voting member is the President of the (Arch)diocesan Council in the diocese. If there is no (Arch)diocesan Council, the President of the oldest "instituted" District Council in the diocese is the voting member.

### **Our Conference has had a request from a veteran who is having financial difficulties. He wants to acquire a certificate of honorable service, but doesn't have the money to pay for it. Is this a legitimate use of Conference funds?**

If there is a genuine need and if it will maintain or build the dignity and self-esteem of the person, it is absolutely an acceptable use of Conference funds.

### **We have always promoted the idea that the funds our Conference receives go to help the poor. How can we spend funds on any other purposes?**

Conference funds may be used for all legitimate expenses of the Society. Generally, this is a very small percentage of the overall funds. It is appropriate for Conferences to spend funds on resources needed to build our ministry by purchasing supplies/services for training or forming our members spiritually or in service. In building up our members, we are building their ability to serve those in need. It is also appropriate to spend funds on resources such as brochures or pamphlets that will assist those we serve. Good communications with the parish should support this position.

### **The question arose during our latest board meeting about the official definition of a home visit and varying opinions were expressed about what constitutes a home visit. Some members said, if an individual feels more comfortable meeting at a coffee shop or other neutral site, it constitutes a home visit. Others said that, even if the individual asks to meet at a neutral site, it does not constitute a home visit. Someone else said that, if they have met with someone in their home and then a follow-up visit is at a neutral site, it constitutes a home visit. I cannot find anything in the Rule that provides a clear definition of a home visit. Can you give me some guidance on that?**

The Rule, Part III, Statute 8 states: "*Visits to those in need should be made in their environment.*" On page 23 in the Manual it states: "*From the Society's beginning, the central and most basic activity of Conferences has been the visitation of the needy in their homes. This is the clearest symbol of our Vincentian charism, which dictates the highest respect for the*

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*dignity of the poor. It symbolizes our Vincentian commitment to reach out to the needy, rather than require them to report to an outside service site. In the home, needy persons feel most free to entrust their stories of struggle. In that family setting, Vincentians are asked to listen, offer humble advice, and render assistance. In the modern world, there are certain situations when a home visit is not possible or advisable – for example, those involving homelessness, battering, or safety. Nevertheless, Vincentians should never excuse themselves lightly or regularly from the tradition of home visitation. Even when assistance is given in an emergency from the parish or other service site, Vincentians should follow up with a home visit.”*

Technically, any person-to-person visit outside of the person’s (family’s) home is considered an “Other In-Person Visit.” A case can be argued for the homeless that anywhere they are is their home, but that is splitting hairs.

### **On the application for Aggregation form, question 8 asks when the Conference holds its assembly. What does "Assembly" refer to?**

The Assembly is equivalent to a general meeting. It's described in the 1958 edition of the Manual as "more formal assembly where, in the presence of the active and honorary members and the benefactors of the Conference, an account is given of the good accomplished and contemplated." This assembly or general meeting is usually associated with a group of Conferences within a Council. However, assemblies are also appropriate for individual Conferences.

### **In Part I of the Rule, it indicates that non-Catholics can serve as officers (Secretary or Treasurer) and in Part III, it says that only Catholics can be officers. Is there a conflict in the Rule?**

There is no conflict. Part I is the International Rule. Part III of the Rule is associated with the Society in the United States. When Part I was approved internationally in October 2003, each nation was given an option related to non-Catholics holding the officer positions of Secretary or Treasurer. The National Council of the United States voted not to allow non-Catholics as officers. There is no conflict. It was an option we were given.

### **Our Diocese is going through a reorganization and three parishes have been combined into one. That means that three Conferences are also being combined into one. We are all aggregated. What do we have to do to correct our aggregations?**

First, are you going to keep the name of one of the Conferences or are you going to create a new one? If you are going to keep the name of a Conference that is already aggregated, then you simply need to inform the International Council General International through the National Council Office of the Conferences to be removed. If you are going to create a Conference with a new name, you will re-apply for aggregation under the new name and inform the Council General International through the National Council Office of the Conferences to be removed. If you are simply going to continue one of the Conferences with a name change, that can also be handled through the National Council Office. The existence of the prior Conferences will not be lost. Records are maintained both at National and International.

### **Since our funds are supposed to be used to serve the poor, how can we justify sending members to Regional and National meetings?**

One of the primary obligations of the office of Diocesan Council President is to represent the diocese at the National and Regional levels. This also holds true where there is no Diocesan Council and that role is filled by a District Council President. As a member of the National

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Council, the Diocesan/District President not only represents the Vincentians in the diocese, he or she is their spokesperson and the link between the National and Regions. This responsibility includes voicing their concerns, problems, or situations, that may have an effect on a national basis, and communicating information back to the District Councils and Conferences. "The Rule" of the Society and the Bylaws clearly document these obligations. Since "The Rule" places this requirement on the office, it recognizes that the responsibility to provide financial support to perform this function also resides with the Councils and Conferences that comprise the Diocesan Council. "The Rule" requires Conferences to provide financial support to the District and Diocesan Council in the form of solidarity contributions. This support is a legitimate expense of the Society and is derived from all non-restricted accounts. All of the above holds true for members of National Committees as well.

**We recently had a case where one of our new home visit teams said they would pay a bill for a client and it turned out that this commitment was against our guidelines. We contacted the family and explained that we could not pay the bill and then we reprimanded the visiting team. Is this the best way to handle this situation?**

Someone from SVdP visited a person or family in need and promised to help. As far as the family is concerned, the bill was going to be paid and they felt relief. When you cancelled that commitment, you placed them in further crisis. You made their situation worse. Obviously, the new team needs additional training and a better understanding of the guidelines. But the family in crisis should not be made to suffer additionally because of the mistake of a member. Guidelines under which Conferences work should be designed to provide assistance - not deny it. The Conference as a whole can override guidelines under special circumstances. Only the "RULE" is absolute.

**I went on a home visit with my partner and we visited a family in need of help with a utility bill. We had recently helped them and our guidelines would not let us help them this time. I really felt for the family and I decided to pay the bill for them out of my own money. Am I right in doing so?**

No. Every member is expected to honor the guidelines approved by the Conference. This is not your personal charity. You represent the Conference and must honor their decisions. You could have brought the case to the meeting and asked the Conference to override the guideline temporarily in order to satisfy this need. The Conference as a whole can override it but not individual members. By paying the bill from your own funds, you dishonored the other members of the Conference and misrepresented the Society. If lack of funds was the problem, then you could have offered to make a donation to the Conference of those funds. However, the decision to help still falls to the Conference.

**Would you please clarify the Society's Rule on members of the same family, i.e. husband/wife, serving as a Conference's Officers, i.e. President/Vice President, President/Treasurer?**

The last sentence of Statute 12 of Part III of the Rule states: "To safeguard the good reputation of the Conference or Council and, therefore, that of the Society itself, appointees should not be relatives of the person empowered to make the appointments." This has been enforced on a number of occasions when Council and Conference Presidents have been asked to replace the officers they appointed. In addition, it is inappropriate for one person to hold more than one office (President/Treasurer, Secretary/Treasurer, Vice President/Secretary, etc.). Each office is to be held by a different person.

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**In the old Rule and Manual, the duties of the Conference Officers were clearly defined. In reading the current Rule and the current Manual, I can't find a description of the officers' roles and responsibilities. Where can I find these or do we just make up our own?**

Don't make up your own. The officers' roles and responsibilities are clearly defined in the Bylaws for Conferences that were approved by the National Council in 2005. You can download a copy from the National Website, [www.svdpusa.org](http://www.svdpusa.org). Click on SVdP Members and then go to the Documents menu. The Bylaws are found on the 501c3 page.

**A couple of our Conference members have suggested a particular use for the funds we collect during the secret collection at our meeting. Other members insist that those funds have to be used to assist those in need. What does the Rule say about this? I couldn't find anything specific.**

The Rule is not specific about the secret collection. When the Society was first formed, the secret collection actually provided all or most of the funding for the works of the Conferences. As time progressed and other sources of funding became available, the secret collection continued as a free-will offering but is almost tokenized. Many Conferences include that collection with normal Conference funds. Some Conferences set the collection aside for purposes to be decided later. The bottom line is that the use of those funds is the decision of the Conference as a whole. How those funds will be used (at least generally) should be decided before the collection is taken. It's a Conference decision. However, once the decision is made, it must be honored by all members.

**I'm trying to find where an active member MUST attend regular conference meetings. See the details of Article 5 of our Bylaws, it's not specific.**

Article 5 is a replication of the Rule, Part III, Statute 3. Briefly, an Active (Full) Member is Catholic, attends meetings regularly, and participates in Conference works and activities. Former National President John Simmons was considered to be the guru of the Rule. I asked him several years ago the question about how many meetings an Active (Full) Member must attend to remain an Active (Full) Member. His answer was that a true Active Member will make an effort to attend all meetings. He/she will want to be with fellow Vincentians as often as possible. With that in mind, the answer is not based on a percentage. An Active (Full) Member will attend the far majority of all meetings.

**Is there a standard naming convention for SVdP Conferences and Councils?**

The traditional standard form for naming Conferences and Councils is "Society of St. Vincent de Paul \_\_\_\_\_ Conference/Council." There may be slight variations on the second part of the name, such as "District Council of..." This format acknowledges the named organization as part of the Society.

**For several years, we have had Conferences that have elected co-presidents to share the office. The question came up: can there be co-presidents for Councils?**

The concept of co-presidents is not in the Rule. Although co-presidents exist in some Conferences, the practice should not have even started. The Rule allows for multiple vice-presidents, so the burden of office can be shared. Having co-presidents is not acceptable for Councils either. Council Presidents hold multiple roles, which include being on the Board of Directors and possibly as National Council member. These positions are not and cannot be shared.

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### **Is it necessary for home visitors to have background checks before they can do home visits?**

Background checks are performed in many dioceses as part of the Safe Environment program required by each diocese. This is definitely part of some of the programs and sometimes the cost is picked up by the diocese. If this is a requirement of your diocese, then you must comply in order to be in ministry.

### **I am member of a conference and I have heard that 5th Sunday 2nd collection of the church should be for St. Vincent de Paul. However, it became apparent that our church is not following that. I would appreciate if you could send me in writing when and how it was voted in by the USCCB.**

The 5<sup>th</sup> Sunday collection is almost considered traditional but it is not a formal collection throughout the Church. Any collection held on behalf of the Society is at the option of the Pastor. You will find many instances throughout the country where there is NO 5<sup>th</sup> Sunday collection for the Society.

### **Can a conference allow a member who was on sabbatical due to the fact that her husband is dying of cancer and needs her care be allowed to vote in the upcoming election?**

Everything depends on circumstances. If, for example, she has missed meetings for several months and is not current with what is going on in the Conference, then the answer should realistically be "no." If she only missed a couple of meetings, then the answer is "yes." You want to avoid the possibility and even the perception that someone was stacking the vote with as many potential votes as possible one way or the other. This would effectively be campaigning, and campaigning is forbidden in the Society.

### **Without going into a lot of details and reasons, our pastor has alienated himself from many parishioners, parish groups and St. Vincent de Paul. He wants SVdP removed from the parish. What can we do?**

The pastor has every right to ask SVdP to leave his parish, just like he has every right to invite us in. There are a few possibilities open to you.

- 1) Ask your District or Diocesan President to meet with your pastor and try to resolve issues.
- 2) Seek assistance from the Bishop of the Diocese. Understand that doing this may make the pastor's feelings toward SVdP worse. People in authority generally don't like it when someone goes over their head.
- 3) Have all of your members join a neighboring Conference turning over your assets to them.
- 4) Continue to operate as a Conference but outside of the parish itself. Find a location to meet regularly and work out the logistics.
- 5) Disband the Conference, turning over all assets to the next higher Council.

### **We got a call from an attorney handling an estate. The specification was for funds to go to a Conference that no longer exists. The attorney indicates the funds were specified to serve the poor. Any suggestions?**

If the attorney agrees, the funds can be turned over to the District Council with the restriction that the funds be used to help people within the boundaries of the parish of the former Conference. The District can then distribute those funds as necessary to Conferences assisting people within those boundaries.

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### **Can a conference or council accept a contribution from a member or any donor if the member or donor wants that contribution to be earmarked for a specific individual person that the conference or council is or has served?**

The answer is "yes, if..." The "if" has to do with the following: the Conference or Council has made a specific determination that it wants to help the individual or family in question at this time and is seeking funding to do so. The Council typically would not be doing this since direct aid is typically given through a Conference. In our Annual Reporting, we don't ask for direct aid from Councils except through special works.

### **If a resignation is received in writing from a Conference member -- do they need to rejoin the conference again as a new member? Please clarify this for us.**

Everything depends on what your procedures have been in the past for accepting new members and the circumstances of the resignation. The Rule, Part III, Statute 3 provides a process for admission. Ultimately, it is a decision of the Conference who may join. However, once they are members, they cannot be removed except by the National President.

### **I am pretty sure there is a policy or recommendation or guideline that "home" councils are supposed to pay costs of participation of their representatives in national-level meetings, but I can't put my hands on it. Where is this policy written?**

The Rule, Part III, Statute 28 states: *Vincentians entrusted to undertake previously and duly authorized offices, missions, or tasks for the Society are entitled to the refund of the expenses incurred.* This is more than just an entitlement. Within the Spirit of the Society, all the works of the Society are works of the group and not the individual. If a member does not get reimbursed for expenses, the work becomes an individual effort and this often causes confusion when members then do what they want rather than what is agreed to by the Conference or Council. This does not directly address National and Regional meetings; however, in Part II of the RULE, International Statute 7.4: "Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General." That said, on page 136 of the 2002 version of the manual, it states: "In accord with the long established practice, the individual Councils and Isolated Conferences are expected to assume financial responsibility for their delegates and committee members to attend meetings as necessary."

### **I understand that I need a special ID and password in order to do Annual Reports. Is this true?**

Yes. [www.svdpusa.org](http://www.svdpusa.org) has a tremendous amount of information that members can use. No special ID or password is necessary for that information. However, in order to get to member information and annual report data, you must have a login ID and password for [www.svdpusa.net](http://www.svdpusa.net). Login authority is delegated through the hierarchy of the Society. If you need access to your Conference's data, contact your Council President, who has authority to delegate this.

### **Who actually casts a vote for the District Council President? Is it any conference member who is defined as fully active or just the members (Conference Presidents) of the District Council?**

The formal voting is done at the District Council meeting designated for this process. However, many times the Conference Presidents bring the information about the candidates to their Conferences and ask the Conference members to vote. The Conference President then takes that

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vote to the District meeting and casts the vote of the Conference. If this is done, each Active (Full) Member has one vote and it must be cast in person.

The voting members of the District Council are the Presidents of the Conferences in the District and the District Council President. Traditionally, the District Council President does not vote unless there is a tie. The only exception to this is when your District Council Bylaws do not correspond with the Nationally Approved Bylaws and your DC bylaws specify additional voting members.

**I have Vincentian who is questioning about the K of C donating funds to their conference. I explained to her that yes we can receive a donation. We just cannot give them funds. The Vincentian states that K of C would like their meeting minutes. When I spoke to a member from K of C they are interested in helping their area with food, and would like to give funds to SVDP. So.... It is okay to give them minutes to meetings?**

During Conference meetings, it is very common to discuss confidential information, such as client names, addresses and the way we are asked to serve them. Many times this information is reflected in the minutes. The answer is “no.” You cannot share this information with anyone outside of SVdP. Conferences are asked to prepare a quarterly or annual report to go to the pastor and parish summarizing what they do. This should be sufficient information for the K of C. If you want, you can ask the Secretary to prepare a one-time summary statement, but not share the actual minutes. I would not recommend doing this very often.

**If the District Council has bylaws and the Conferences are an integral part of the District, is it necessary for the Conferences to have their own set of bylaws?**

In 2005, the National Council approved seven sets of bylaws to be used by all Councils and Conferences throughout the country. In the document, it is stated that all Councils and Conferences are required to have a set of bylaws. There are two formal sets of bylaws for Conferences approved by the National Council: “Bylaws for Conferences without a Board of Directors” and “Bylaws for Conferences with a Separate Board of Directors.” The first is the standard that most all Conferences can use. Council bylaws (four Nationally Approved sets) differ from Conference bylaws related to specifics as to voting members, officers roles and responsibilities, etc. So it is important for each to adopt the bylaws.

**In our Conference boundaries, there is an apartment complex that is really a rough area to go into. It is heavy with crime and drug use. Our members don't feel safe going there. Is there some specific training or documents available that address how we feel and what we should do?**

There are no specific documents that address this concern directly. I can tell you the advice I have given while presenting many workshops for Vincentians. This topic usually comes up when discussing home visits. Most Conferences throughout the country have an area of town that is considered too rough or dangerous to go into. Whenever the question comes up, my advice has always been: if you really feel uncomfortable in going to the home or apartment of an individual or family because of safety concerns, then arrange to meet with them at a neutral site. This should not be an excuse to eliminate home visits and have those in need always come to the parish office, the Conference pantry or some other site. In the American Manual of the Society (1980) it reads on page 76: “But most would acknowledge that dialogue with the poor must at times be conducted outside the home; for example, circumstances may require the seeing of clients in a parish office setting. The home visit remains, however, of paramount importance in almost all parish Conference work in this country.”



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**We are a fairly new conference and the following question arose at one of our meetings. "If we do a home visit and we suspect abuse or we run into deplorable living conditions, and there are children in the home", should we be reporting it to the authorities? Either the police or the county social services? Or does this invade their right to privacy?**

For members of the Society, there is no legal obligation to report such findings. There is, however, a moral obligation when you have a strong suspicion or have actually witnessed something. In most states, when you contact child protective services, your identity is confidential. Also, understand that you will not be updated on any details. Once the report is given, it is in the hands of child protective services and you are out of the picture. In almost every diocese, members of the Society are required to take Safe Environment Training. This is a question which should be posed to those in charge of the program in your diocese.

**When I first joined, we were told the secret collection is a sacrificial donation based on need in self-denial; should be cash & because of the reason it is done, should not be tax deductible. However, recently I've been told they can deduct this on their IRS & pay by check. I know nobody can be forced to do anything, but it sounds counter-productive as part of the society's tone to do this. I don't know what to say to them at this point. We need more clarification...I know donations are tax deductible, but ???**

First of all, all donations to the Society are tax deductible – sacrificial or not. There is nothing in the RULE or the Manual that specifies that secret collection donations have to be cash. Checks should work just as well. When the Society was first founded, the secret collection was the basic funding for the Conference. Today, it is more of a token (although still intended to be a sacrificial offering) and many Conferences use it for various purposes other than putting it in the general fund for Conference aid.

**I am the president of our SVdP conference. I tried to obtain the forms regarding 501(c)(3) status. I couldn't find the member tab or forms. I know that our Council has obtained its own 501(c)(3) status and I am worried that our conference is no longer covered. Can you help me find the forms that I need?**

First, check with your Council. Your Conference may be covered by their 501c3. If you are covered by them, you don't need to apply for inclusion. As far as the member tab is concerned, bring up [www.svdpusa.org](http://www.svdpusa.org). In the top right hand side of the page, you will find a tab for SVdP Members. Click on that. That will take you to the Members Information Site. Across the top, there are a number of tabs. Go to "Documents." A menu will drop down. Click on "501c3." Everything you need is there.

**One of our Conference Presidents has now reached the end of his two consecutive three year terms. His Conference has not elected a new President and is making no effort to do so. The President believes he can continue in office. How should this be handled?**

Officially by the Rule, the person holding office is no longer the President. In fact, the Conference is without a President. However, all of the other officers remain in office until a new President begins his/her term. Write a letter from the Council to the former President, copying each member of the Conference and the Pastor. The letter should contain 1) thanks for the service he provided to the Conference over the years; 2) notification that he is no longer the Conference President and cannot serve as President for at least three years; 3) notification that the Conference officially has no president; 4) indication that it is the responsibility of the Vice President to hold an election as soon as possible; and 5) notification that the Vice President is

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temporarily the acting President of the Conference. Delivering the letters can be done by mail or email; however, the most effective way is to hand deliver them at a Conference meeting, personally thanking the former President for his service.

**One of the conferences in our District is putting information about SVdP in their Church Bulletin. I think the information about what and when they are doing things is great! They also put in pictures of their Vincentians and the number of years they have been involved. I did not know if there was a conflict with us promoting ourselves or patting ourselves on the back. I would love to do this for our members, but just wanted to make sure it was acceptable.**

It is not that it is unacceptable as much as it is imprudent. Just keep in mind that, as you make yourselves known, you open yourselves up to be contacted directly by those in need. This can be a heavy burden because those in need may call pretty regularly and at inappropriate times.

**Our Council has its own independent 501(c)(3). Is there any advantage to us to be listed in Part II of the NSGED?**

It is optional to be listed in Part II of the NSGED. The only real advantage is if someone comes to our website looking for confirmation of tax status and you are not listed, they may not go to you directly for confirmation. At least, if you're listed, the question is answered. Other than that, it lets us know in the National Council office who has their own 501(c)(3).

**Our District President resigned recently. Instead of electing a new President, 3 Conference Presidents agreed to take part of the responsibilities. So far it is working well. Are we in compliance with the Rule or do we have to have an election?**

Within the structure of the Society, each District Council must have a President and a full slate of officers. Each of the Conference Presidents who accepted the specific roles you identified are effectively Vice-Presidents or Committee Chairs in their roles. Only one person may be District Council President and fulfill those responsibilities. An election will be necessary.

**Can a Conference President appoint a member of his/her family to be one of the Officers?**

It is in the Rule. Part III, Statute 12, the last sentence: "To safeguard the good reputation of the Conference or Council and therefore that of the Society itself, appointees should not be relatives of the person empowered to make the appointments." The answer is "no."

**Who actually casts a vote for the District Council President? Is it any conference member who is defined as fully active or just the members (Conference Presidents) of the District Council?**

The formal voting is done at the District Council meeting designated for this process. However, many times the Conference Presidents bring the information about the candidates to their Conferences and ask the Conference members to vote. The Conference President then takes that vote to the District meeting and casts the vote of the Conference. If this is done, each Active (Full) Member has one vote and it must be cast in person.

The voting members of the District Council are the Presidents of the Conferences in the District and the District Council President. Traditionally, the District Council President does not vote unless there is a tie. The only exception to this is when your District Council Bylaws do not correspond with the Nationally Approved Bylaws and your DC bylaws specify additional voting members.

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**We have an organization that we work closely with at times and it is my understanding that we cannot donate any funds to outside organizations. I believe, however, that we can purchase goods for them to give away or pay the invoice for goods to be given away. Is my interpretation correct?**

Yes, we cannot give funds to other organizations because we don't have any control over how they use their funds. But we can provide merchandise that they will give to others as long as we are comfortable in how they do the distribution and that the distribution is free of charge, as SVdP would give it.

**Our Conference owns a box truck that is used for our Food Bank and to deliver free appliances, furniture, etc. to families. Currently, our truck is insured by the Diocesan Fleet Insurance policy of which our parish pays its portion. What is the best way to handle our responsibility for our own insurance? Can we pay the Diocese for our coverage and remain on their policy? Should we have our own separate policy?**

There is no reason for you to switch to your own policy as long as the parish is willing to include you on their policy. If you feel that continuing this would put a strain on your relationship with the parish, then seek a separate policy.

**It is my understanding that only Presidents of aggregated Conferences can be voting members of a District Council. Is this correct?**

The Rule, Part III, Statute 10 specifies: District Councils, which represent a minimum of three, and ideally a maximum twelve Conferences in an (Arch)diocese. Although there is no specification that the Conferences have to be aggregated in the Rule, when a District Council applies for Institution, there is a requirement that at least three of the Conferences must be aggregated. The specification is "at least three" but not necessarily all. In the nationally approved bylaws for District Councils (both sets), you will find two statements in articles 11 and 12. Article 11 states: The Presidents of affiliated Conferences. It does not specify aggregated. Article 12 states: After a Conference President has been elected the name of that person shall be submitted to the District Council President, thereupon that person shall be enrolled as a member of the District Council/Board and installed at the next District Council/Board Meeting. Again, there is no specification that the Conference must be aggregated. Although this answers your question, it is highly recommended that Conferences get aggregated as soon as they are eligible (after one year of service).

**An officer at our conference is concerned about long-term financial sustainability, but does not want to accept twinned funds. He wants the church and local community to support the Society in totality, with no "outside dollars." Why does twinning exist? Why was the concept created? Is it acceptable to have a poorer parish consistently and perpetually twinned with by more wealthy conferences? Should the Vincentians within the conference spend more time on serving those in need or on fundraising to become sustainable?**

There are a number of things you are questioning. The process of twinning was established to help develop relationships between SVdP Councils and Conferences. The concept calls for an exchange of resources, correspondence and prayer. This is generally manifested as funds being sent from a Conference that has extra funds to a Conference in need of financial assistance. The receiving Conference sends a letter to the donor Conference explaining how the funds were used. Each Conference prays for the members of the other Conference and the people they serve. There are many times when Conferences share other resources such as food. I have seen a number of instances when one Conference will send members to help another Conference do

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home visits. It is totally acceptable for a poor Conference to be perpetually twinned. There is one Conference I am well aware of and have personally visited that spends around \$70,000 a year to help those in need in the parish. It receives 95% of its funds regularly from other Conferences in the diocese. Vincentians are supposed to be humble servants of the poor. We should never let our pride get in the way of receiving resources for those we serve. The three objectives of the Society are growth in holiness, fellowship, and service. Fundraising is necessary to a certain degree but is not an end of the Society. Keep in mind that we are called upon to be dependent on Divine Providence. I have personally witnessed the bounty of Divine Providence over and over and over again.

### **Can you tell me the average number of members there are in each Conference in the United States?**

Based on the 2012 Consolidated Annual Report, 3,961 Conferences reported having 63,875 Active Members and 26,955 Associate Members. This makes the U.S. average of 16.1 Active Members per Conference. This also makes the U.S. average of 22.9 Active and Associate Members per Conference.

### **We have been receiving grants from United Way and this year they are requiring our Conference to present to them a formal CPA-level audit. Does SVDPUA have a requirement that all conferences with EINs, or those included in the Group Exemption, have a full external CPA audit each year?**

The Society does not require a formal CPA-level audit. It is recommended for larger Councils and for Conferences that have a lot of special works. Those Councils and Conferences that have a formal audit are doing so primarily so they can apply for grants; the audit is a basic requirement of most of them. For a small SVdP Conference, it would probably cost more for the audit than you would get in the grant. IRS does not require it. However, if you want to continue to receive grants from United Way, and if they continue to require the audit, I recommend you try to find a CPA (possibly a member of your parish) who would be willing to do a pro-bono audit for you. Since you are a small entity, it would be an easy job.

### **Do the conferences have to have by-laws or can they adopt the Council's? If they have to have them, how often do they need to be renewed?**

You should not adopt the Council's bylaws. They are specifically written for the structure and operation of a Council. Conferences are expected to adopt the nationally approved bylaws. The norm for Conferences is the set titled "Bylaws for Conferences without a Board of Directors." The latest version can be found on [www.svdpusa.org](http://www.svdpusa.org) in the section on 501c3 Documents. Every year or two, the National Council approves some minor wording changes to the sets of bylaws. It is at that time that they should be reviewed and re-adopted.

### **Is it possible for a Conference to be named after a person who is beatified but not yet a saint? Appreciate the clarification.**

Yes it is. However, keep in mind, there is a restriction against naming Conferences for St. Vincent de Paul or Blessed Frederic Ozanam unless the parish in which the Conference is located has that name.

### **If a conference currently included in the 501 group ruling enters into a collaborative effort with another nonprofit to operate a soup kitchen, is there any impact to exclude them from the group ruling? Also, if that effort is exclusively a conference effort, is there any impact on the council as part of the group ruling?**

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The answer to both questions is “no.” If the Conference is using the Council’s EIN, the Conference should seek permission from the Council before establishing or joining a collaborative. The only real impact on the Council would be if they are submitting a consolidated 990 to IRS which includes all the Conferences. If so, just be sure to report to the Council everything that is appropriate.

**We are establishing an advisory board for a special project we are embarking on. There are a lot of good people in the community who can help us, but not all are Catholic. We heard that the advisory board must be all Catholics. Is this true?**

An advisory board is essentially a committee. Within the Society, the committees, where possible, should be made up of Vincentians. But, in some cases, it is necessary to draw committee members from the community because of their background and influence. As long as the leadership of the committee is Vincentian, the other members do not have to be Vincentian or Catholic. The group is "advisory" -- meaning that the ultimate decisions will be made by Vincentians.

**Our long standing practice has been to issue vouchers when assisting those who ask for our help. An obvious limitation has been that not all businesses accept our vouchers. In general, the existing practice works well. However, we have been discussing whether the use of our conference's credit card would be a practical and secure way of giving assistance when a business will not accept our voucher. Currently the conference's credit card occasionally is used for paying operational expenses. We want to research what guidance and/or experience there may be addressing the use of a credit card as one way of processing assistance. Is this already a practice by others? If so, has it been successful? not successful? Are there do's and don'ts?**

Many Conferences use credit/debit cards to handle bill payment. Keep in mind that you absolutely need receipts to be submitted to the treasurer for reconciling the account. The problems that have come up in using this method are primarily in two areas:

1. Lack of receipts. Members tend to forget them or lose them. We must follow good accounting practices.
2. There have been many occasions when members have used the cards for personal purchases or expenses. This should never be allowed. It does cause reconciliation problems and is not a good practice.

The credit/debit card use is not the same as a checking account. It takes a lot more scrutiny. There have been instances of embezzlement related to the mis-use of credit/debit cards.

**I have a question, I have a Conference, when they were formed we formed them with three parishes in one because the priest was the same in all three parishes....They are a strong conference with lots of good works...the president is asking me if another parish 5 miles down the road that has it's own priest wants to join them? I have asked him why they don't start their own...and awaiting his response...can you tell me can we allow another parish to join in just because they want too? If that is the case.**

I am sure that managing the calls from three parish areas is difficult. Typically, you should have three separate Conferences. The pastor should not determine the operations of the Society. The larger the area is that is covered, the more likely it is that the Conference will begin to be run more as a business than a charitable organization. Even though the society may operate businesses (i.e. stores), the Society is not a business and should not be treated as such. I have seen multi-parish conferences move away from home visits because they have “too many calls

## ***Common Vincentian Questions and Answers***

and home visits take too much time.” I don’t know anything about your particular situation or your operations; however, I do not recommend expanding. Individual Conferences are better.

### **Does the newly elected Conference President need to be inducted into office by the Council President to make it official?**

There is no formal requirement for the Council President to induct a newly elected Conference President. There are liturgies/ceremonies that are available for newly elected Presidents that can be found in the book “Vincentian Celebrations” available through the National Office.

### **When does a newly elected Conference President formally take office?**

According to the bylaws for Conferences (approved by the National Council), a President’s term is from October 1st through September 30th three years later. If the newly elected President takes office at any other time, the first year of office is a short one (still ending on September 30) and then the President serves an additional two years. When the President actually takes office is normally determined at the time of the election. The office of President should be vacant for as short a period as possible.

### **Now for the policy question. A client contacted us for food, and then we saw his name on TV on the Crime Stopper's most wanted list. What should we do in that situation? Deliver the food anyway? Contact the police, and if so, were does confidentiality fit in? I would imagine that we're not the first Conference to encounter this. What's the policy of the Society?**

First of all, I would hope that our members are not checking the names of the people we serve against Crime Stopper’s Most Wanted List. It is not appropriate for us to be doing background checks in any way on those who call for help. Are you positive that it is the person being sought by police? Many people have the same or similar names. If you are positive that it is the person being sought, then consider the following. People do not get on the “most wanted” list for shop lifting or running a red light. It usually indicates a very dangerous person. The recommendation would be to stay out of harm’s way, do your civic duty and report your suspicion to the police. However, understand that the police will not get back to you with any information. So, if it is not the same person, then he/she will be going without the help requested.

### **I have a technical question. I understand Statute 19 "Removal of a President"; however, that seems a bit involved. Since the President serves at the pleasure of the Board of Trustees, and is elected by the Board of Trustees, why can't that board remove him or her? I would think that you could have a 2/3 vote of "no confidence" and that should do it. Yes? No? Would appreciate your take on this.**

A District Council President is elected by vote of the Presidents of the Conferences in the District Council (not a Board). A Diocesan Council President is elected by vote of the District Council Presidents in the Diocesan Council. It is not against The Rule to have a vote as you indicate; however, it is not a vote for removal. The vote of “no confidence” can be used to request the president’s resignation. Only the National President, with authority delegated by the International President General, can remove an elected officer from office.

### **Our Conference has not been doing many home visits and we would like to promote this and get our members comfortable with it. What is available in the way of training for doing home visits?**

The Ozanam Orientation is an excellent training tool. Part of the Ozanam Orientation is a segment devoted to home visitation. This segment includes a Powerpoint presentation as well as training videos which present both the right and the wrong of home visits. Many Councils

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throughout the country have separated home visits from the Ozanam Orientation and offer it as a separate workshop. There are lots of materials available related to this.

### **Does the Society have a policy related to investments that is based on moral objectives?**

The Society has no specific written policy related to investments based on moral objectives. However, the Society does have a formal commitment to follow the teachings of the Catholic Church. This commitment must be reflected in all aspects of the Society's dealings.

### **I was told that it is the policy of National that all Vincentians must be background checked and fingerprinted. Is this true?**

No, it is not a policy of the National Council. However, in April of 2011, the National Council passed a resolution (#91) that states the following: *it is the obligation of all Vincentians to comply with the requirements of the program to protect children in their (Arch) Diocese and it is the responsibility of (Arch) Diocesan Council Presidents, District Council Presidents and Conference Presidents to ensure that compliance.* The requirements may vary from one diocese to another. If background checks and fingerprinting are a requirement of your Diocese, then you are obligated to comply.

### **On the annual report it asks for the number of active, associate and contributing members. When we count contributing members we look at those parishioners who contribute regularly (on a monthly basis). We go by the directions on page 6 of the annual report form. This makes our numbers quite large and I see that other councils do not have these large numbers. Are we doing this correctly?**

The instructions on the form states: Contributing Members require no formal action for enrollment. Recognition of such status is simply granted by the Society in acknowledging the financial donations of generous or regular contributors. Contributors are invited to be present at general and special meetings. Contributing members also include those who regularly contribute resources other than money, such as food, clothing, etc. It is inappropriate to simply count the entire parish as contributing members.

My question is: Do you keep a formal list of each individual contributing donor? Just like you have a list of Active members and a list of Associate members, you should have a specific list of contributing members and validate that list at least annually. The problem we have come across is that some conferences have simply included their entire parish as contributing members and that is not valid. It is too easy to simply include all parishioners as contributing members. When you have any members (Active, Associate, Contributing), you know specifically who they are. The Society is not trying to report big numbers. We are trying to report accurate information.

### **Our Conference has been fortunate to have received an estate. We invested the money. How should we reflect gains or losses on the annual report? Should gains be in "other income" and losses in "other expenses?"**

The gain or loss should be reflected in "5E Other – Misc. Receipts" - the gain as a positive or the loss as a negative. The loss is not an expense.

### **I have a conference that has started the year with about \$110,000 and after providing to clients for the year and receiving contributions they ended the year with over \$120,000. They aren't willing to share with other less fortunate conferences that we have, what are my options? Does national have any guidance**

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### **on what is a reasonable carryover each year to continue operations but not be hoarding?**

The Rule, Part I, Article 3.14 is explicit: "The society's funds must be handled with utmost care, prudence and generosity. Money must not be hoarded." The ultimate goal of any Conference when it comes to its funds is that it spends down all of its funds for the purposes of the Society. Decisions should never be made in favor of stockpiling or investing money instead of assisting those in need. This is where hoarding comes in. A reasonable amount of money may be set aside in a reserve for those Conferences that have fixed expenses such as Conference rent, utilities, employee salaries, etc. Not many Conferences fit this description. The money was given to the Society to be used, not to be set aside in an account to earn interest. In the case described in question, our advice has always been for the Conference to spend down the principal in the bank regularly and not allow it to grow. It has even been recommended that the Conference cease its parish collections until it spends down its balance. If we have the resources to help, we should be using them.

### **Not all of our members feel comfortable responding to an unusual request and would prefer to allow another team to handle the call and the ensuing Home Visit. One of our members found a SVDP document of a few years ago that dealt with this matter that may or not be proper thinking today. The document stated that the team initially receiving the request MUST deal with it and not pass it along to another team. Please comment on this situation.**

In general, if a team feels inadequate to be able to deal with the specifics a call, they should feel free to ask someone else to take the call. But this should be a rare occasion and should not indicate a mode of operation. This could easily lead to over burdening certain teams with most of the calls. It is also appropriate for members to opt out of calls to family or close friends. It would be helpful to know what the "unusual request" is? There are certain times when members are in disagreement with the Rule and/or spirit of the Society and don't want to deal with certain types of calls. This is improper. People who don't feel they can fulfill the requirements of the Society should examine themselves and decide if this is the proper ministry for them. I am not familiar with any document coming from the National Council that would force members to go on any call.

### **Would it be acceptable to give SVDP funds to subsidize our parish school tuition? We would not be notified who these families are just that the school board and pastor screened them and they need help towards tuition. They are not necessarily poor but having a hard time paying their tuition. Would this be according to the Rules?**

According to the Rule, this is not allowed. There are two considerations here. One, because education is available at no cost throughout the country, this is not considered to be a necessity. Catholic or private schools are an option. Second, we are not allowed to give our funds to another organization – no matter how good the cause – not even our own parish. The funds were given to the Society to use in fulfilling our mission – not to give to other organizations to fulfill their missions.

### **How are international disaster declarations handled and who issues them?**

The President General (international) usually issues a worldwide circular appealing for funds/donations for national disasters and requests such funds/donations be sent to the Council General in Paris for management and distribution of the funds to stricken countries. The Council General in turn communicates with the National Council of the stricken countries and also works with the International Territorial Vice-President and the Coordinator in the areas



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concerned. In this way there is proper communication and process for accountability of the funds sent.

**I found in the SVDP Treasurer's Manual that all checks over \$200 should require 2 signatures (Chapter 2 page 2). This Manual has a 2004 date. I could not find anything in the Rule or the Manual. Is this something that a Conference can decide for itself?**

There is no rule associated with the two signatures on checks. It is a good practice as long as you understand that most banks will not verify both signatures. So, being a good business practice does not guarantee validity of a transaction. This is a Conference decision.

**After a recent weekly meeting, a few Vincentians found themselves involved in a conversation concerning families we visit who are requesting financial aid and have an excessive number of pets. We had mixed opinions as to the fine line between being judgmental and being good stewards of the Conference funds. We understand that pets provide companionship and entertainment however, when a family has 5 or more dogs or 10+ cats and the pets are not a means of income, (breeding, etc.) should this situation be taken into account when we decide whether to provide aid and how much to provide?**

The biggest problem that Vincentians face is making decisions influenced by the requester's life style. This is where crossing the judgmental line comes into play. You can and should provide your good advice to the best of your ability. However, your purpose is to evaluate the request (asking for financial aid), determine the validity of the request (do they really need the financial aid), can you fulfill that request (can you provide the funds they requested), and is fulfilling the request the right thing to do (yes or no)? You are not asked to say "yes" to every request. Our Lord's love is unconditional and He asks us to love those who come to us in the best way possible. What would saying "no" accomplish?

**We have a member who checks the public/police acknowledgements of people who are arrested for crimes in our service area, most notably, drug possession. From this information he checks the files for clients we have served and uses their public infractions to disqualify them per our resolutions. I have some members who believe this is wrong and I cannot find any SVdP policy in the Rule that covers this scenario one way or another.**

The Rule, Part I, Article 1.4 states: *The Society serves those in need regardless of creed, ethnic or social background, health, gender, or political opinions.* Our efforts in the Society are to find ways of helping people – not to find ways of turning people away. We are to seek to find the face of Christ (not the devil) in the poor. It is inappropriate for members to do background checks on those who come to us for help. The same holds true for checking public notices or crime lists. There should never be an attempt to serve only the "deserving poor" – they don't exist. The member that you refer to should be told to stop checking the lists. Also, your Conference should have no resolutions that support this activity.

**We have a Conference that is interested in getting a determination of the needs in the community as seen from a Client's perspective. In this regard they are considering having a local University develop a questionnaire to use in a telephone survey that would be conducted by their students. The proposal is to provide the University with a list of phone numbers of the clients that have been served by the local Conference. No names or addresses would be provided with the phone**

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**numbers. One could argue that the phone numbers by themselves do not break the confidentiality. Could you give me your thoughts on this?**

This would not be a violation of confidentiality as long as the University program is working specifically on your behalf. They would have to assure you that they will keep the numbers confidential and not share any information they acquire outside of the project they are working on for you. In other words, if you are asking them to do this on your behalf, it is okay. If they are doing an independent study and asking you for the numbers, it would be a violation of confidentiality.

**We have so much need in our area and so few resources that we need to limit our help in some way. My Conference just passed a rule recently that it will only help families. Is this permitted?**

Part III of the Rule, Statute 8 addresses the whole idea of non-discrimination in our services. One of the phrases addressed is "marital status." To not help a person because he/she is single is a clear violation of the Rule. This holds true for couples without children as well. We understand the issue of limited resources. The idea is to help until the resources run out -- don't limit it to just families.

**I just came from a conference meeting where the President resigned and told the Vice President to take over his duties and be the new president. I did indicate that the VP needed to have an election where the conference must vote in the new president. Then a motion was made that the VP would only act as a President through September when a vote would be taken so that the first year would start on October 1<sup>st</sup>, rather the first year ending on September 30<sup>th</sup>. The president is unwilling to continue his presidency even for 3 months. Is this the proper way to handle this turnover?**

It is close enough to September 30 (3 months) to not worry about it. They have three months to follow the formal process of nominating committee and election. But emphasize that they have to follow the process and search for candidates. The process is described in a document on the website ([www.svdpusa.org](http://www.svdpusa.org)) under Council/Conference Documents. It is called "Election Process-Conference." The Vice President does NOT simply move into the President's role.

**My question is I was told that the neighboring conference pays their workers who help out in their store. I know the surrounding areas this is all Volunteer work. Is this true that that store hires their employees?**

I cannot answer that question since I am not familiar with that store. However, keep in mind that there is a mixture of paid staff and volunteers throughout the SVdP store system. Some stores are all volunteers, some all paid and some mixed. It is obviously best if it could be all volunteers, then more funds get to be used to help those in need. Unfortunately, not all areas are blest with sufficient volunteers to regularly fulfill all of the job and time requirements.

**Due to a lack of pantry facilities, our Conference has purchased and given out gift cards to those we serve for food and other necessary items. Our pastor wants us to stop giving out those cards because he says they are as good as cash and people can purchase anything with them. There is confusion among our members because of this. What do you advise?**

There are Conferences throughout the country that are using gift cards as well as direct store vouchers. Store vouchers and some gift cards may be restricted to food items. Some may be restricted to anything other than alcohol and tobacco. Every type of voucher and gift card system is based on the belief that those being served will use the voucher/gift cards for the need

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discussed in the home visit. This is a matter of trust. With trust comes an increase in dignity and self-esteem - both of which we should be providing to those we serve. There is always the possibility of someone abusing the system and misusing the voucher/gift card. But to make the assumption that this will always happen is the wrong outlook for a Vincentian. Our purpose is to help people in the best way possible – not to look for the takers. If we built our services around the fear of being taken, we would never give people the love our Lord is asking us to give.

**I was looking for the Conference Meeting Agenda on the website and could not find it. Is it there somewhere?**

The Conference Meeting Agenda is in the Rule, Part III, Statute 7. The Rule is on the SVdP Member site of the [www.svdpusa.org](http://www.svdpusa.org) website under Council and Conference Documents.

**At our last meeting the Conference approved and sent \$500.00 to a 501 C 3 charity that pays for grave markers for the homeless and poor. None of our members are associated with this charity... although personally I feel it a very good cause and one our parish may have been interested in helping. In my reading of Statute 26 this was not a valid use of our Conference funds. Is this a legit use of SVdP Conference funds?**

As you describe it, the answer is “no.” This would only be a legitimate use of SVdP funds if there was a specific person that this was identified for – someone (a family member) had requested this specifically for an individual and the Conference agreed to provide this. It does not work if you give the funds and then, after giving the funds, the charity gives you the name of someone it was used for.

**Is it appropriate and ethical to donate a significant amount of money to a local conference directing where that donation should go? e.g. a mortgage payment, a used car, tuition, etc. and then write that off your taxes as a charitable donation to SVDP?**

It is appropriate for Conferences to accept restricted donations that are identified for general things like food, rent, utilities, etc. It is also permissible to accept donations to help a specific individual if the individual/family was approved for help by the Conference and if the donation was based on a request from the Conference to help that individual/family. It is NOT proper for a Conference to accept an unsolicited donation from a donor who wants the funds to go specifically to an individual/family for a purpose they designate.

**SVDP is a lay organization. Thus priests cannot be members, or can be members but cannot hold office. (3.1 of The Rule is the paragraph on Membership, but doesn't say anything concerning this issue.)**

Rule, Part I, Article 1.1: *the Society has been Catholic from its origins. It remains an international Catholic voluntary organization of lay people, men and women.* Rule, Part III, Statute 15: *Priests and deacons are not eligible to be elected or appointed in the Society to any office outside their spiritual role.* I have known priests who have also gone on home visits.

**Conference names must be religious in name and cannot be St. Vincent de Paul or Frederic Ozanam. (I know I've seen this somewhere, but cannot find it now.)**

It's related to the Application for Aggregation: You must choose the name of a saint (other than Vincent de Paul or Frederic Ozanam); but the Virgin Mary titles, titles of Christ, or holy angels can also be chosen. Typically, the name of the parish where the Conference is located is used.

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**We are about to have an election for District Council President. Our existing Council President is not running for a second term. As Council President, he will not vote unless there is a tie. If the election results in a tie, he is allowed to cast the tie breaking ballot. Is my understanding correct?**

You are correct. That will work in your case since your Council President is not running for office. However, keep in mind that in the future, it would be best to set a specific tie breaking process that would not include the existing President's vote. That process needs to be approved by the Council before the election takes place.

**I have a comment in my notes that all officers of the Board [and I assume officers of councils and conferences as well] must be Vincentians [I read this to mean Catholic]. I can't find any reference to this in the Rule or the By-Laws. Can you lead me to where this distinction is made?**

The Rule, Part III, Statute 3: An Active (Full) Member accepts the Rule and Statutes of the Society, belongs to the Catholic Church, and is received as a Vincentian brother or sister into the Society's Conference or Council with which he or she is affiliated. Normally, membership implies Conference affiliation. Less commonly is membership obtained through direct Council affiliation. Only Active (Full) Members hold office in the organization.

**Diocesan Council Presidents are required to attend National and Regional meetings. (I cannot find this anywhere.)**

National Council Bylaws, Article 11: *(Members of National Council are) the duly elected and currently serving Presidents of the (Arch)diocesan Councils...* National Council Bylaws, Article 13: *The annual meeting of the National Council, which shall be a face to face meeting, shall be...* In Part II of the RULE, International Statute 7.4: *"Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General."* That said, on page 136 of the 2002 version of the manual, it states: *"In accord with the long established practice, the individual Councils and isolated Conferences are expected to assume financial responsibility for their delegates and committee members to attend meetings as necessary."*

**Our Conference is being inundated with calls for help in these tough economic times. We have talked about giving food as often as needed. But we have been talking about limiting financial help to once a year. What is approved by the Society in cases like this?**

As a general rule, Society Conferences do not place limitations on the service they give except as a basic natural limit of resources – when you run out, you stop. It has always been a part of the Rule that no form of charity is foreign to the Society. So limiting the types of service we provide does not correspond with the Rule. Limiting the number of times we help a person or family is very limiting, since once you determine that they have reached a limit, you stop listening to the cry for help and are not open to exceptional cases. Also, nobody ever said we have to say "yes" to everyone who comes to us. Our Lord is asking us to love our neighbors in the best way possible and sometimes that means to say "no." Our recommendation has always been to take each case as it comes to you and treat each one on its own merit. Don't start holding back for a rainy day – today is the rainy day. Don't hold back for someone who might be more worthy – then you are being judgmental. And, don't restrict your help to certain groups (families, seniors, etc.) because our Rule prohibits discrimination. Treat each case on its own merit.

**We have a SVDP Thrift Store that supports our Conferences. Each Conference receives a check each month. Each year we have a Christmas Party for all**

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**Volunteers. Items from the thrift store are used as door prizes and free Raffles. I believe that the items donated to the Thrift Store are there to help the poor Not make a party. What is your take on this?**

There is a difference of opinion on this, but I will give you my take. Generally speaking, Conference Members do not desire or expect any material reward for the work we do as Vincentians, whether it is doing home visits, working in the pantry or working in the thrift store. And, they expect that the funds of the Conference are used to help those in need. It is also a fact that most stores in the country depend very heavily on non-Vincentians to volunteer and help out in the stores. A common practice that is heavily promoted among non-profits is providing for volunteer appreciation in some way. Many Councils and Conferences provide this for those who work in their Stores and Special Works. I have also seen Councils who have had an annual appreciation dinner for their Vincentians. The National Council has a few volunteers who regularly help out in the office. We do a volunteer appreciation in some way once each year. As long as it is not extravagant (whether funds spent or items selected from the thrift store), it is good fellowship and contributes positively to fulfilling the second objective of the Society: fellowship, community.

**What is the Rule “number” for proxies voting in the place of a Conference President, in a District Council Election?**

Article 14 of District Council Bylaws states: **Proxies:** *Each District Council member shall be entitled to one vote which must be cast in person, provided, however, that should any District Council member be unable to attend any meeting, that District Council member shall have the power and authority in writing to designate an alternate or proxy from the same Conference as the District Council member.*

**Our Vice President has resigned from the board, and our board president is considering asking the lady that the Cardinal named as the Archdiocesan representative to the board to take the position of V.P. She has only just joined the board, but seems enthusiastic and would bring many gifts to the executive committee. Are there any restrictions to be aware of in making this decision?**

Only Active (Full) Members of the Society may be an officer at any level in the Society. If she does not qualify as an Active (Full) Member of the Society, then she cannot be an officer. Also, as this is a lay organization, will it look like the Cardinal is exerting control over the Society? Perception has a great deal of influence on people.

**Can a conference continue to refer to their group as “The St. Vincent de Paul Society” if they do not establish their own EIN/bank account and establish 501 status as part of the National Group Exemption, or establish their own exemption separate from their parish/the Archdiocese?**

There are multiple answers to this question. First, not every Council or Conference that is part of the National Group Tax Exemption must have its own unique EIN. Conferences may be covered by their District or Diocesan Council. However, the EIN must not belong to the parish or the (Arch)Diocese. Second, on page 26 in the Manual, it states: *“Society funds are to be maintained by the Conference, not by the parish. The Conference must have a separate checking account, and it does not require the signature of the pastor. Society funds must not be commingled with parish or individual accounts.”* Control of the Society’s funds and operations must always be in the hands of its lay members. By using the parish EIN and bank account, the Conference is disregarding the lay characteristic and autonomy of the Society. This is described in Part I of the Rule, Articles 5.1 through 5.3.

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### **Is there anything short of an appt. with a priest that we may consider "Spiritual Aid"?**

"Spiritual Aid" can take a lot of different forms: praying with those we visit; distributing religious goods (rosaries, prayer books, holy cards, bibles, medals, etc.); arranging appointments with priests or deacons; distributing parish bulletins as an invitation to come and see; etc. St. Vincent de Paul would say that our Vincentians are "inventive to infinity."

### **Are there any limits imposed by The Rule or The Manual to the amount of time a conference can provide assistance to a particular person or family? Under any circumstances, does the Society refuse or deny assistance based on assistance already provided over a period of time? If someone has received help according to our guidelines (for example, help with food once a month, utilities once every 3 months) is it consistent with Society rules to end (deny) assistance after a specific period of time (say 2 years)?**

The Rule sets no limits. Do not put time constraints on assistance. Treat every case on its own merit. After assisting a specific person or family for a significant period of time, you as Vincentians should be asking yourselves "have we done everything we can to change the situation causing this person or family to seek assistance regularly?" Remember: the Society was founded on the basis of adopting families until they were out of crisis. This does not mean that you have to say "yes" to every request. You must be discerning; however, our goal is to help people - not turn them away.

### **Our Conference does not have a lot of members. As the newly elected President, I need to appoint officers. Can one member hold two offices, like Secretary/Treasurer?**

There is nothing explicit in the Rule or the National Council Approved Bylaws related to this. In Part II of the RULE, International Statute 7.4: "Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General." The tradition of the Society is one-office/one-person. This is set in place to such a degree that, when applying for aggregation, the application will be rejected if one person holds more than one office.

### **Our diocese is beginning to combine parishes, each with active conferences. Is there a formal procedure to notify national/international that the parishes are blending their parish communities and will have one conference? The combined Conference will have a new name. Do I need to do anything formal? The bank accounts will become one account. Anything else?**

It's a relatively simple process. When two or more parishes are combined, the one single Conference that remains will request to have their name changed. This will be sent to the National Council Office. Let them know if the Conference is aggregated. If it is, Paris will be requested to change the name and issue a replacement letter of aggregation. For the Conferences that are closing, the Council needs to send the letter requesting the dropping of those Conferences. Again, if they are aggregated, Paris will be requested to drop them from the Society. Also, if any of the Conferences are in the National Group Tax-Exemption or National Group Insurance plans, the changes will have to be made. Besides the combining of the accounts, the closing Conferences need to send a final annual report and transfer all their records to the combined Conference. Please be sure that your Regional Vice-President is aware of what is happening.

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### **Is there an age limitation related to the election of Council or Conference President in the Rule?**

There used to be an age limitation in the old Rule, but that was removed from the old Rule back in the 1980s. It was determined to be age discrimination and should not be in the Rule. In general, the new Rule adopted in 2003 has no limitation; however, it does establish an age limit only for the International President, who serves a 12 year term.

### **SVDP has a rule not to hire or allow registered sex offenders to volunteer for any of SVDP works. Do we have a rule for other types of offenders?**

The Society of St. Vincent de Paul made a formal commitment to follow the requirements of each Catholic Diocese in their Safe Environment policies. That is where the prohibition against having sex-offenders as volunteers or paid staff comes from. We may not be able to bring them on board as volunteers or paid staff, but our Rule prohibits discrimination if they are in need of help. As far as other types of offenders, those are decisions made by local SVdP Councils and Conferences. The principle of subsidiarity calls for those decisions to be made locally.

### **A question from the Conference trying to fill out the aggregation application: what is a reasonable answer to question 9? When does the Conference hold its assembly?**

The "assembly" is the official annual meeting of the Conference. Generally, this is officially held by Councils but is very appropriate for Conferences. It would be a meeting following the end of the fiscal year in which the Conference's annual report is shared among the members.

### **I have some questions about the reporting of Person-to-Person Visits on the annual report. One of our members says we can count visits that are not a direct result of our SVDP work. For example, some of our members volunteer at a nursing home. Can they count this as eldercare visits?**

Any work that falls within the Society that is done with the explicit intent of this being a Vincentian work can be reported. For example, if you are visiting nursing homes because of your involvement in the Conference, yes it counts. If you are visiting nursing homes as part of another ministry in which you belong, it should not be reported. We are not trying to build up numbers. We are asking members to simply and honestly report the work they do.

### **Could you give me some idea of what may be covered under "Other In-Person Visits"?**

Other In-Person visits includes anytime you meet someone (to serve them) at a location other than their home, for example, meeting someone at the parish office or your Conference pantry. Another example, someone calls and is in need of gasoline, you meet them at the gas station. Another one, because someone who calls for help lives in an area of heavy crime, you agree to meet at a neutral site.

### **I have been asked to e-mail you concerning Part 1, Rule 7.6 namely the extent to which this Rule may apply, if at all, to a conference such as ours. Our thinking is that this Rule would most likely apply at the Council and mostly at the National level. If our thinking is not correct, what might be some examples as to how we might abide by the spirit of this Rule?**

That part of the Rule is one of the bases for the formation of Voice of the Poor (VOP) Committees at both Council and Conference level. Members are encouraged to participate in VOP. Individual members can join CAPWIZ and advocate on behalf of the people they serve by making contacts to legislators. Our National President (through the National Voice of the Poor

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Committee) regularly informs our members of opportunities we should take advantage of to speak for the poor. Councils should be informing their members of like opportunities at state and local level.

**I know that Statute 3 of the Statutes of the National Council of the United States defines Active and Associate members. I also understand that, if a person meets all the criteria and makes home visits, we would consider that person an Active member. If a person meets the criteria and does not go on home visits, but volunteers at a SVdP food pantry handing out food boxes, is the person considered an Active or Associate member?**

The definition of an Active (Full) Member calls for a person to be Catholic, attend meetings regularly, and participate in the works of the Conference. There is nothing in the Rule that specifies that an Active Member must go on home visits. Working in the pantry qualifies as a work of the Conference.

**Do Conferences give financial help for attending private schools?**

The Society focuses on helping people with the necessities of life. In the United States, attending private schools is considered an option rather than a necessity. The Society generally does not assist in this.

**Our Conference had a meeting with our Pastor. He wants statistics relative to our clients as to their origin. Can you give me a diplomatic explanation as to why we cannot do that?**

It is very simple. We do not track that type of information. Our Rule (Part I, Article 1.4) specifically prohibits us from any type of discrimination in giving assistance, so we don't track anything that might lead to that.

**Is it acceptable for a Council President to also carry the office of Conference President?**

It is not a problem from the Rule and Bylaws. It is done in many parts of the country. It is, however, not recommended because of the responsibilities that go with each position. Another thought on the issue. When a Council President holds the position of Conference President as well, does he/she get two votes in the Council meeting – one as President of the Conference and one as President of the Council? Who represents the Conference in the Council meeting? These should be answered before he/she takes office. This is something that should be addressed by the Council.

**We have a Presidential election coming up in our Conference in September. In reviewing our roster there are a few members listed as "active" members who either have not been to many meetings, maybe half, or less, and/or have not made many home visits, 0-3 home visits this year. In an effort to "keep the peace" the leadership would like to allow these people to vote anyway in the upcoming election, rather than tell them they cannot vote, at this late date, just prior to the election. However, we also have members who are listed as "associate" members who are more "active" than those who we are trying to allow to vote. We feel if we allow these "active" members who really are not active, by definition of the RULE, to vote, then we should also elevate the status of those who are listed as "associate" status to "active" status and allow them to vote as well. However, when I read the language in Article 4 of the RULE, it appears to me that the process I would need to take in order to make these members "active" could not be accomplished in time**



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**for the September election, since it requires "approval" by the Conference PRIOR TO being formally commissioned to vote. How do you interpret Article 4, and what should I do to solve this issue?**

Two things must be clear. First, has your Conference been following the admissions process in the Rule (Part III, Statutes 3 and 4) on a regular basis? And second, have you been formally identifying the members as Active or Associate? We want our Conferences and members to follow the Rule, Manual and bylaws. However, if you have not been following certain aspects of it and want to start, you don't do it at a point of controversy unless it is with the consent of the Conference as a whole. If you have not been strict in identifying who Active Members are, enforcing that just before an election is improper. If you have not been going through a process of moving Associate Members up to Active status, then doing so just before an election is improper. If you want to make these membership changes before the election, make sure it is with the consent of the current Active Members of the Conference. This decision does not have to be unanimous but it must follow the normal decision making process defined by the Society.

**What is the Society's stand on comingled funds and parish collections?**

In the Minimum Standards for Conferences that was approved by the National Council, number 11 states: The Conference maintains a bank account separate from the parish, under the control of the conference Treasurer. (Rule, Part III, Statutes 12 and 24, U.S. Manual, Pages 26 and 30) There shall be no comingling of funds. The Society is in control of and responsible for all funds donated to it – the collection of those funds and the distribution of those funds. A parish may hold a collection on behalf of the Society, but it must then turn over those funds to the Society in a reasonable time. Sometimes the parish will count the collection and turn over the funds to the Society. Sometimes the parish will put the collection in a bag and hand it to the Society for their counting. In either case, the funds are given to the Society in a timely manner. Each Conference, as part of their obligation to good stewardship, will provide to the parish at least an annual summary of its collections and expenditures. No details are to be provided because of our emphasis on confidentiality.

**Have you heard of any written policy that addresses not requiring clients to pay back money paid on their behalf for assistance? I have a newly reactivated conference that has some newer members who are about to challenge the conference about this issue. The conference does not require this nor does any as far as I know but I do not see anything in writing that says such a policy could not be made by a conference.**

There is nothing explicit in the Rule or the National Council Approved Bylaws related to this. In Part II of the RULE, International Statute 7.4: "Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General." That said, the words "giving" and "gift" are used throughout the Rule, Manual and other writings of the Society. We are told to imitate Jesus in all we do, and Jesus' love is unconditional. Giving loans, expecting payback is contrary to the spirit and tradition of the Society. There might occur specific circumstances that would make this appropriate; however, not as a general rule.

**Our Conference has closed our Thrift Store and we want to gift the building to our parish for a dollar. Is this okay?**

If the building is in the name of the Conference, you have a right to sell it. However, selling a property for a tokenized amount (such as \$1.00) is the equivalent of giving away assets of the Society. The amount doesn't matter as much as the principle. In this case, it is making a donation to the parish (an outside organization). Based on our Rule, this cannot be done. Even

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if your Conference would close, based on the wording in the nationally approved bylaws (updated through May, 2014), you cannot turn over assets to the parish; the assets would be turned over to the next higher Council.

### **Who is the official spokesperson for the Society? Where will I find this in the Rule?**

It's not specifically in The Rule, Manual or Bylaws. The answer is tradition. The only official reference I can find in old manuals is a statement under the duties of the Council President to "make the work of the Society known." In the old Rule, it specifies that the Conference President "represents the conference in contacts with religious and civil authorities." In our model bylaws, it states the President "ensures that links and communications are effectively maintained" and "develops working relationships." In the book "Governance: Council and Board" it is stated on page 66: "The National President is the only spokesperson of the Society on national issues. The elected Council President is the official spokesperson for the Society on local issues. No other Board member or Vincentian speaks for the Council!" There is no need to explain this further. People, in general, understand protocol.

### **Should a contributing, registered parishioner receive preferential treatment from his parish SVdP society? What are the rules for the distribution of monies? Does every parish society set their own rules? Is this a gray area?**

The decision to help or not and to what degree is the choice of the individual St. Vincent de Paul Conference. There is no stated recommendation one way or another toward parishioners. This is something that must be worked out on a local basis.

### **Does National plan to provide special instructions for Conferences for filling out their annual 990 that needs to be sent to IRS?**

The National Council will not be providing any information related to filling out the 990. The form is an IRS form (which potentially could change every year) and they provide instructions for it. The 990-N is easy to fill out. The 990-EZ is not too difficult. Most all Conferences qualify for either the 990-N or 990-EZ. The full 990 is generally only filled out by Councils and rare Conferences that have complex structures, facilities and services.

### **I am a caseworker in a conference. I wondered if there is any guidance in the rule or manual about a conference using an annual budget. If not, based on your experience is it worthwhile pursuing?**

The Rule does not address budgeting. There are a couple of statements on page 26 of the Manual under "Funds of the Conference" that apply here: "The Society has held from the beginning that the funds donated to the Conference belong to the poor" and "Donations to Conferences ... are meant to address today's needs." Generally speaking, a Conference is expected to spend all of its funds for the purposes of the Society (primarily for assisting those in need). The normal Conference has no need to establish a budget unless there are fixed expenses that it has. For example, some Conferences operate stores and, therefore, have a need to establish a budget for that operation. Some Conferences are expected by their parish to make a contribution to the parish to pay for utilities or rent for the space they use in the parish. Those are budget worthy items. However, a normal Conference would have no need to budget \$xxx for food, \$xxx for rent, \$xxx for utilities, \$xxx for medical, \$xxx for transportation, etc. A budget like that tends to turn people away rather than help them. The best bet is for the Conference to treat each case on its own merit and spend its funds as each need comes up.

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**I have looked through the rules book and did not see anything relating to the termination of an officer for non-performance. Can you direct me to someone I could call or somewhere in the books that relate to this problem?**

According to The Rule and bylaws, the President of a Conference or Council appoints the officers after consultation with the members. The President also has the right to un-appoint and choose someone else if the officer is not fulfilling his/her role properly. "Terminate" has a strong meaning and may also imply removal from the Conference or Council. Only the National President (with delegated authority from the International President) may remove a member, Conference or Council from the Society. I would also like to point out a special condition. I don't know if your Conference follows this process. There are some Conferences in the country who have chosen to follow a policy of electing all of the officers. This is not the approved procedure of the Society and so presents a problem when it comes to removal/replacement of an officer who is not fulfilling his/her role. Sometimes, the remedy is written into the Conference guidelines or bylaws. If not, the Conference may vote to remove the person from office (but not from the Conference) and then have another election. The best bet is to always follow the approved procedures of the Society.

**Why are memorial donations to be categorized as Fund Raising as opposed to being listed as Other Income on the Annual Report?**

Memorial donations could fit into either Fund Raising or Other. The difference depends on solicitation. If you specifically solicit the memorial donations, then it is fund raising. If you receive them as a by-product of someone else's solicitation (non-SVdP) or no solicitation, then it is simply other income.

**One of the Conferences in my district had a trust fund created when one of their members passed away and left a large sum of money. Where should the trust fund information be reported on the annual report statement? Should it be treated just as another source of income with a beginning balance and ending balance?**

It really depends on how the trust fund is set up. If the Conference owns and controls it, then "yes" it is like any other account – reflecting beginning and ending balance and all plus and minus activity. If the Conference is only the beneficiary of its interest, then you only reflect income as you receive it.

**At a public school in our community there is a fund that has been established which is called a "Student in need fund". This is a fund in which if there are children that for whatever reason have no food to eat at school can have a hot meal and the cost would be taken out of this fund. We are learning this gets used more than what anyone would anticipate. Here is an example. A young lady whose parents do not qualify for free or reduced meals because of financial reasons, make poor choices on what to do with their money and there is nothing left to put in her lunch account. Because of this she is too embarrassed to sit with her friends at lunch because she has nothing to eat or is able to have a peanut butter and jelly sandwich but then everyone knows that she has no money to eat. Being in High School there most certainly can be a lot of peer pressure when it comes to this. With this being said we would like to know if we could help fund this account with a donation. It would have to be made to the fund listed and would be monitored by the school administrators.**

You are able to fund the individual's lunch but not make a donation to the fund. The fund is considered to be an outside organization and a donation is prohibited. If you can make the

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contribution specifically for lunch for the individual only, then it would be appropriate. But you have to be sure it would be accounted for the individual you specify.

**Please comment on the following situations: 1) Every Home Visit team should include at least one Active Member or practicing Catholic; and 2) Every home visit team should include at least two adults ?**

Neither The Rule nor the Manual addresses your two situations. Keep in mind, however, that the Society is a Catholic based organization and, if matters of faith are discussed, they should be discussed from a Catholic perspective. It makes sense that every home visit team should include one Active (Full) Member; however, there are many Catholic Associate Members who can handle home visits properly and represent the Society properly. Be careful with the phrase “practicing Catholic,” there is no easy way to determine this and The Rule does not specify that for Active membership. Also be careful with the statement that “Every home visit team should include at least two adults.” As a general rule, it is a good premise. But, I have known a lot of very mature 16 and 17 year olds who I would feel comfortable with on a home visit. I have also known many adults that I would cringe at going with on a home visit. Age is not always a determining factor for who should go on a home visit.

**I am a Diocesan Council President. One of my District Council Presidents has submitted a Consolidated District Council Report but refuses to send me copies of the Conference Reports indicating we have no need for them and he will not comply. Is there a rule or bylaw supporting his position?**

Conferences are supposed to submit their annual reports to the District Council. The District Council then submits a District Council Report and a Consolidated Conferences Report to the Diocesan Council. The Diocesan Council then submits a Diocesan Council Report, a Consolidated Districts Report and a Consolidated Conferences Report to National. Courtesy copies of the Conference reports should go to the Diocesan Council; but this is not required by rule or bylaw. However, based on the Rule, Part III, Statute 23, the Diocesan Council may request copies of the Conference Annual Reports. The Statute states: “These reports are published internally and externally and are made available to all members and the public in general.”

**Are annual audits required? Under what rule or bylaw? If under bylaw, what if the Conference or District has not adopted the bylaws?**

The Rule, Part III, Statute 27: “When deemed appropriate Council Presidents should require audits or audit reviews of the Conferences (at minimum, an internal review), or of Councils, and Special Works under the auspices of their Council.” A Council President, through his Council, may “require” annual audits of all Councils and Conferences under his/her jurisdiction.

As far as bylaws are concerned, the standard bylaws were approved by the National Council in 2005. They have been updated by National Resolutions through May, 2014. Within those bylaws, the National Council has defined the rules of governance within the Society in the United States. Whether an individual Council or Conference adopts those bylaws or not (the expectation at the time of approval was that all would adopt them), they have the same force as the Rule and the Manual. This is the way the Society in the United States is expected to operate. “The truth is the truth whether you choose to believe it or not.”

**Can or does each conference need to have a sales tax exempt number? Our conference from time to time put up some of our clients into a Super 8 motel and they are asking for a sales tax exempt number? Can a conference use the Council's tax exempt number or does each conference have to apply for their own and**

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**should we have one? For instance, we are putting up a client for 7 days until they get paid to get their own place and the extra tax money amounts to like \$70 some extra dollars. Just trying to save our conference from having to pay the sales taxes, etc. What is the policy on this with the SVDP Society?**

Sales tax exemption is granted through each state as they deem appropriate. If your Council has a sales tax exemption, it would be up to them to allow you to use it.

**We are getting ready to vote on our bylaws. I know we need a quorum at a meeting in order to vote on them. Can you please define a quorum for me? Is it based on all active members or only members attending the meeting we are voting at?**

A quorum for a Conference meeting consists of a majority of Active Members in a Conference. For example, if your Conference has 15 Active Members, at least 8 must be present for the meeting to be valid or for a vote to take place. Then for a vote to pass, it must be approved by a simple majority of the Active members present. Each Active Member has one vote and that vote must be cast in person. There are no proxies allowed.

**Does the Rule allow the Society to actively support passage of a levy?**

Generally speaking, the Society is allowed to promote for or against specific legislation. We CANNOT promote for or against candidates. That said, the Society generally sticks with issues that directly affect those in need in some way.

**Is it permissible to give cash to someone asking for help?**

There is no Rule that prohibits the giving of cash to those in need. In fact, in older versions of the Manual of the Society, giving of cash was specifically addressed. It was approved as a valid medium of assistance where no other way was possible and where the Vincentians were confident that the funds would be used by the recipient as intended. One segment in the Rule does address this indirectly. The Rule, Part II, Statute 7.4 states: *Any matter that is not specifically governed by any Parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General.* In order to ensure a proper audit trail, there must be valid paperwork associated with each cash transaction. Because of the paper trail that is required, it is no longer deemed appropriate to give cash directly to someone in need.

**Is it permissible to give direct assistance to those in need from a thrift store?**

The assistance can be given from a store setting. However, there are some conditions that should be met.

1. The interview and assistance should be given by two members of the Conference – not by paid staff. This is not a staff responsibility. It is part of our ministry as Vincentians. The purpose for paid staff is to help members do their work – not do it for them. There is a tendency for this type of assistance to turn into a paid staff thing rather than a member thing. That would hurt the Society in the long run.
2. The interview and assistance should be given by two members. We do things in pairs.
3. The assistance at the store should NOT be used to eliminate home visits, but rather to supplement them.

**In the event of a tie vote does the conference President have the authority to cast a deciding vote?**

Generally, a Conference President does not vote on issues that come before the Conference. Under our belief that all of our leadership should be Servant Leaders, the Conference President

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should listen to the Conference members as they make decisions. However, in the case of a tie in a vote, the Conference President is expected to cast the deciding vote.

**One of our Conference members, who was an Active Member for a long time, left the Conference and has been gone for a couple of years. Recently, he has rejoined the Conference. Can he simply be re-instated as an Active Member?**

One of the qualifications for Active Member status is attending meetings regularly. The determination of regularity has been identified as attending the far majority of meetings. No percentage is defined. When a person stops attending meetings on a regular basis, then that person drops from Active to Associate status. If a person asks for a leave of absence (meaning they intend to be non-active in the Society for a specific period of time, such as snowbirds), then the Conference may choose to simply re-instate that person to Active status upon return. When a person simply leaves the Conference and is no longer considered a member, then, upon returning, he/she should be treated as a brand new member and come in as an Associate until he/she has shown he/she is attending meetings on a regular basis again. Any member who has left the Society and then returned is a new member; so the requirements are the same as they would be for any new member.

**Can you provide your advice and guidance regarding a conference's desire to open a credit card account? The conferences share the same taxpayer ID as the Council, we are NOT using the National office's EIN.**

This falls under the realm of a Council decision. With the Conference using the Council's EIN, the Council is in a "doing business as..." relationship with the Conference. Technically, the Council is the legal entity; so use of the credit card places an ultimate obligation on the Council.

**I joined the Conference because I was asked to work to help the poor. Since that time, I have heard from various people that helping the poor is really not the purpose and we should be focused on our spirituality. Is this true?**

The best way to answer that is to let Frederic Ozanam, the primary founder of the Society, speak about this in his own words: "The end of the Society is to enkindle among the young, the Spirit of Catholicism – our principal aim is not to come to the assistance of the poor – that was the means we employed. Our object was to keep ourselves in the Catholic Faith and to spread the Faith among others through Charity." Helping those in need is an important part of the Society, but our ultimate aim is our members' growth in holiness.

**The Rule: Part I, Article 3.8 and Part III, Statute 6 reference Aggregation and Institution. However, I cannot find a formal definition for either. Where can I look?**

The word aggregate means to bring a particular into the whole. I had to go back a ways to find formal definitions:

*Manual of the Society of St. Vincent de Paul (1958 edition), page 4:* Every Conference which desires to obtain admission into the Society, must apply to the Council-General for aggregation in accordance with the conditions prescribed in the "Instructions for the Formation of Conferences"...

*American Manual of the Society of St. Vincent de Paul (1982 edition), page 126:* Official recognition and acceptance of a Council into membership of the Vincentian family requires the affirmative action of the Council General ... Application forms for the Institution of Councils may be obtained...

**Can an associate member of SVDP sign food pantry checks?**

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Any member (Active or Associate) may be a signer on an account. However, this is generally a privilege/responsibility given to Active Members since they are expected to attend meetings and can more readily address any questions related to the checks written.

**Here at our conference, we are concerned with the amount of information and statistics that we are required to track. It would seem we are not in accordance with the Rule, Part 1, Article 1.4. The form we must complete is a two-sided page with many statistics that we are then required to enter into the computer system we are currently using. This information is then available to any and all conferences and Vincentians in the area. My questions to you are: Are we collecting too much data on our clients? And should we be sharing so much personal information with so many others? I am attaching a case record form for you to view.**

The National Council has a case record form that is given out with the Conference Secretary's Manual. This form was created after reviewing the forms used by various Councils and Conferences throughout the country. In fact, about 35 different forms were sent to us for review. The point is that there are a lot of different methods and tools being used throughout our Councils and Conferences to capture information about the people we serve. There is not one tool or method that is appropriate for all. The information you are tracking has been approved by your Council, so it is deemed appropriate for your area. Is it too much information? I don't believe it is possible to fill out every box, or answer every question, on every home visit. You gather information as it is appropriate and available. Our emphasis on confidentiality does allow for sharing of information among Vincentians. From what you have presented, I don't see any violation of confidentiality or potential for discrimination.

**Our conference maintains a small office to serve those in need and a small store. There is a sub-committee that deals only with store issues. The president of the conference will not allow certain Vincentians to attend the store committee meetings. Is it permissible to exclude conference members from a sub-committee?**

Generally speaking, all meetings of the Society are open to all members. However, these are not town hall meetings, inviting participation of the crowd. Vincentians who are not members of the Council, Board or committee should be silent and only observe what is going on in the meeting. Anyone who is disruptive should be asked to leave. Sub-committees generally meet when and where it is convenient for the specific members of the sub-committee; the time and place is usually not published. Typically, members are asked to participate; they are normally not excluded unless it would present some sort of conflict of interest.

**Can a conference donate to a local food pantry if it is not SVDP run?**

By the Rule, Conferences cannot give funds to an outside organization. The primary reason is that we don't know how they will spend their funds. That said, if the Conference members regularly worked in the pantry that you speak of, then it could be considered to be a Vincentian work. It could then be supported as long as the resources given are given to those in need freely (as SVdP would).

**Some of our members are struggling financially. Can the Conference reimburse them for gas used on home visits or for babysitting so they may participate in meetings and works of the Society?**

The Rule, Part III, Statute 28: "Vincentians entrusted to undertake previously and duly authorized offices, missions, or tasks for the Society are entitled to the refund of the expenses incurred." There are no specific criteria listed in the statute, so that means it is up for

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interpretation by the Conference or Council. However, keep in mind that when referring to legitimate expenses, receipts are required – not a simple allocation of funds. You also have to keep in mind that what you do for one, you may have to do for others. Don't set precedents you are not willing to follow.

**I am looking in the Manual, page 10, regarding Plenary Indulgences for the Society. It uses the wording: "when participating in a Festival Meeting" as a requirement. Can you tell us the definition of Festival Meeting?**

If you continue reading on page 10, a festival meeting is when the Vincentians gather "for Mass and a meeting." This would be on one of the Feast Days listed in that same paragraph. The word "festival" relates to "Feast Day."

**We recently had an election for President of our Conference. When the results were announced, we just announced who won the election. We did not give the total votes for each candidate. Would it have been appropriate to do so?**

There is nothing explicit in the Rule about this. It falls to tradition. In Part II of the Rule, Article 7.4 of the Rule states: *Any matter that is not specifically governed by any parts of the Rule and Statutes shall be governed by Tradition and, in the final instance, by the decision issued by the Board of the Council General.* The counts are withheld to avoid potential problems associated with really close results. People who are really caught up in the process could demand recounts or new elections. Our elections are supposed to have no campaigning and, therefore, they should be the result of inspiration from the Holy Spirit. The nominations committee should be double checking the ballot count and should be ensuring that quorums and majorities are covered. With that, the Council or Conference should be confident the results are correct and valid. No numbers or percentages should be revealed.

**Who is responsible for filling out the Conference annual report?**

Filling out the annual report is a three person job. The Treasurer provides the financial information, the Secretary provides the statistical information and the President reviews the report and signs off, saying the report is valid.

**Our annual budget is about \$120,000 plus food. We request grants in financing our activities. Recently, we have been turned down due to the lack of certified statements. Given that an audit would have little value aside from this requirement, is there any SVDP policy on conference audits?**

The Society has always recommended that Conferences have an informal audit annually or at least when a new President takes office. Because of the size of your program, you need to decide if the cost of a formal audit is justifiable related to the grant request. It boils down to your choice: fulfill to requirements associated with the grant request or withdraw the request.

**A parishioner is requesting for someone to pick up her husband from an Adult Day Care and take him home on occasion when she can't do it. My question is would this be ok from an insurance/legal stand point? It was suggested that I ask you if we are covered under the group insurance from the National Society. Also I am sure anyone that would do this from our conference would have their own car insurance.**

From an accident standpoint, the car insurance of the Vincentian covers it. From a liability standpoint under group insurance, it would be covered as long as everything is done in a Vincentian way. For example, person-to-person works of charity are done by two Vincentians.



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**If a Catholic attends meetings but has no contact with the poor, are they full member or associate? A situation: a person attends meetings regularly, their company gives substantial money every year, but their job prevents them from participating in our work. It has been suggested to let them return calls from our answering machine so they are serving the poor. The majority of the conference wants them classified as full member so as not to lose the donation from their company. Your thoughts?**

To summarize The Rule, Part III, Statute 3, an Active (Full) Member is Catholic, attends meetings on a regular basis and participates in the works of the Conference. It sounds to me like you need to make every effort to get this person involved in the works of the Conference in some way. Keep in mind that all Active Members are eligible to be officers. Do you want someone as an officer who has no experience with the works of the Conference? It is the Conference who decides who is an Active Member and who is an Associate. We ask that you be consistent with everyone and not be motivated only by money.

**Considering the Church's stance on gay marriages and the gay lifestyle, does the Society have a right to refuse service to a gay couple, specifically providing them with a double bed?**

There are a lot of moral issues that present themselves to our members over time. The issue you present comes up on occasion - providing, room, rent, bed for a gay couple. How about the case of a couple (man and woman) who indicate they are not married? What about someone who is known to be a sex offender? The Rule of the Society, both in Part I (Article 1.4) and Part III (Statute 8), states that we are not allowed to discriminate. "The Society serves those in need regardless..." The teachings of the Church make it clear what is good and what is bad, what is right and what is wrong. Those values are used to determine our own actions. However, our faith also insists that we are not to judge – God is the sole judge. Whether we provide room, rent, or bed does not mean that sin will be committed. For example, consider the case of giving furniture to a family in need. The father takes the furniture (which now belongs to him), sells it, and then buys drugs or alcohol with it. Should we not have given the furniture to the family? Should we stop giving furniture to other families in the future? The bottom line is that we are not to discriminate.

**Our Elder Care team makes visits to the elderly in our parish. They have been asked by some families to spend some extra time with the homebound individuals (and sometimes provide a respite for the family caregivers). The question has come up as to what would be our liability or exposure if something (i.e. a medical emergency) occurred while we are there? I suppose something like this could happen even during a home visit with the poor, so I'm not sure if we would treat these cases differently. However, do you think we should be concerned about getting into a situation like this, or would our status and/or insurance coverage protect us?**

There is a difference between what we do as members of the Society and caregivers. When they are giving respite to the family caregivers, they are effectively acting as the caregivers and need to be qualified to do so (whatever minimal training that is required). Any liability insurance the Society has is based on what we normally do as Vincentians and doing so in a Vincentian manner. If we do something not in compliance with what we promote and do normally, liability coverage may not be provided.

**We are having our Annual Awards banquet and I am chair for the nominations of awards. No one can seem to agree on the order of the awards. Which award is the**

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**very highest, which award next, etc.? Also, is there someplace I could find this defined?**

Awards are unique to each Council and Conference granting them. There is no set order defined by the National Council. I'm not even aware of an order defined by tradition. Again, each Council and Conference grants their own awards and decides the order of importance.

**As a Conference can we limit the amount of money we pledge to those we serve, and can we put a limit on how many times a year we can serve the same person?**

This is a Conference decision; however, the limitations are not recommended. We recommend that you treat each case on its own merit. Make your decision as to the amount of assistance to give based on what is being requested and the resources you have available. Vincentians often say that their funds are low and they need to save some funds for people who might come in the future. That is not what our Lord is asking us to do. He is asking us to love the one in need who is sitting here in front of us in the best way possible. If you place an arbitrary limit on the amount, then you cannot fulfill what our Lord is asking.

As far as the number of times a year to serve the same person, the same criteria essentially holds true. If you limit the number of times, then you turn people away before you even hear what they are asking for and what their circumstances are.

You don't have to say "yes" to every request, but we ask you to listen and to be open to help in any way possible. St. Vincent asks us to be "creative to infinity."

**The definition of memberships is somewhat vague in the manual. Does National have any additional guidelines on what constitutes a full voting member of a Conference, especially on how many meetings members need to attend to maintain active status?**

The Rule, Part III, Statute 3 identifies clearly the membership types. There is nothing in the Rule that specifies who is eligible to vote. However, in the Nationally Approved Bylaws for Conferences, it states that each Active Member is entitled to one vote and that vote must be cast in person. Former National President John Simmons was considered to be the guru of the Rule. I asked him several years ago the question about how many meetings an Active (Full) Member must attend to remain an Active (Full) Member. His answer was that a true Active Member will make an effort to attend all meetings. He/she will want to be with fellow Vincentians as often as possible. With that in mind, the answer is not based on a percentage. An Active (Full) Member will attend the far majority of all meetings.

**Here in our city, there is a movement among nonprofits to have conversations about endowments with donors. This is being spearheaded by our local community foundation. Could you please give us your opinion on endowments in light of the issue of hoarding?**

Endowments are permitted as long as the endowments are funded by donations specifically for that purpose. You should not use funds identified for service to those in need in order to build an endowment. Run an endowment campaign and solicit funds specifically for that purpose.

**Are Members allowed to use any of the Society's resources (food, clothing, etc.) for their own personal use?**

In every set of nationally approved bylaws, the following paragraph exists: **Compensation:** *"No part of the property belonging to this entity, nor its net earnings or income shall ever inure to the benefit of any member or individual, or any person having a personal or private interest in the activities of the entity. There shall be no fee or honorarium for Conference service beyond reimbursement of expenses."* One example of the above is that members cannot

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receive a financial benefit from their involvement in the works of the Society. Some people think this refers to money only, but it does not. It refers to any resources that belong to the Society. Whether it is food, clothing, furniture, medications, or money, the members of the Society are not to take any for their personal use. The fact is that the members are not to benefit from the availability of any resources purchased or received as donations for the poor. For example, a member or volunteer may not take merchandise donated to a store for their own personal use. Another example, a member cannot go to the Conference food pantry and simply take food for their own use or use Conference gift vouchers to get things for their personal use. This also refers to using the Society's name or accounts in order to acquire something that will benefit an individual member. For example, a member cannot go to a food bank and under the name of St. Vincent de Paul purchase food for their own use.

### **Do you know of anywhere that we might find a written history of the Black Bag? Several of our conferences have asked, but I'm not sure where to look.**

The secret collection goes back to the beginnings of the Society. In the beginning, the funding for the Conferences came strictly from the members themselves. There was no parish funding, no special collections. The secret collection gave an opportunity for each member to contribute what they could to the works of the Conference without anyone knowing who gave how much. I don't remember ever seeing anything written about the origins of the Black Bag itself, but it only makes sense that there had to be some type of bag used in order for the members to contribute without others seeing what they gave. Update: On page 87 of the latest printing of "Apostle in a Top Hat," it indicates the first Conference used a top hat for the secret collection.

### **Some of our conferences receive donations in the form of gift cards to super markets and places like Target which they then distribute to clients during Christmas. These gift cards have cash value, and so I am thinking the conference treats them as such. I am thinking this would be reported under 5E: Other-Misc. Receipts.**

The gifts cards received as donations would be treated as in-kind. When they are distributed, they have a specific value for the purpose for which you give them (food, clothing, etc.). They are not cash so they would not be treated as 5E. They cannot be deposited to your account and show up in the balancing of your accounts.

### **How are the Nationally Approved Bylaws updated and why is it that we Vincentians in the Conferences don't know about the changes? Once we find out, are we expected to update our bylaws with the changes approved? What is the process?**

The changes to bylaws are made through resolutions approved by National Council Members (NCMs) at the Midyear Meeting and/or the National Assembly. Once approved, it is up to the National Council Members to inform their Vincentian Community of what took place and what resolutions have been passed. After the resolutions have been passed, the resolutions are placed on the [www.svdpusa.net](http://www.svdpusa.net) website for access by membership. Since originally approved, the following resolutions have authorized wording changes to the bylaws: 033, 046, 080, 094, 111, 113, 117, and 118. The bylaws that will be found on [www.svdpusa.org](http://www.svdpusa.org) have been updated based on all appropriate resolutions.

Once bylaws for individual Conferences and Councils have been updated for the approved changes, they must be formally approved by the Conference or Council. Approval of the modified bylaws can be given by consensus and does not require a formal vote.

Conferences are supposed to get formal approval of their bylaws from their District Council. District Councils are supposed to get formal approval of their bylaws from their

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Diocesan Council. Diocesan Councils are supposed to get formal approval of their bylaws from the Regional Vice President. Isolated Conferences are supposed to get formal approval of their bylaws from the Regional Vice President. The record of bylaw approval would be kept by the appropriate approval entity.

**The statutes and bylaws are clear that only active members vote and that ordained spiritual advisors do not vote. But this leaves a gap. Can ordained men who meet the usual requirements become active members? If so, can they vote if they are not the spiritual advisor?**

The Rule itself does not make specifications about voting, except that voting is only a last resort. Decisions are to be made by consensus (Rule, Part III, Statute 16). The Nationally Approved Bylaws for Conferences states that each Active Member has one vote and that vote must be cast in person. The Manual does specify on page 48 that “ordained” Spiritual Advisors do not vote. The emphasis here is on “ordained” – not Spiritual Advisors. This is from tradition. Ordained men (bishops, priests, deacons) cannot vote. So an ordained man can participate as an active member but without the privilege of vote or holding office. However, their opinion and influence can still be voiced and felt.

**I am a Conference Member and I object to one part of the Annual Conference Report. I have a real problem with the ethnic breakdown that is requested on the report. The federal government has a special form that is used for Ethnicity and Race Identification. I don't see any value in providing this information.**

The Society does not use this information in any discriminatory way. Based on our Rule (Part I, Article 3.2), we are not to discriminate in membership. The breakdown in the annual report is simply to show how diverse the Society is. Occasionally, there are questions related to this from major funders.

**Our conference has been helping with rent. We started to offer the final \$100 towards rent. We found this didn't help much so we offered our max per needy at \$300 to rent if it would help. Some home visitors have been requesting up to the max \$300 for rent even if the tenant owes much more and cannot pay anything. My question is, should we be interfering with the tenant/landlord lease agreement by offering our max assistance if it keeps the needy housed for another 30 days? Should we even talk to the landlord unless arrangements have been made by the tenant with their landlord?**

Our role as Vincentians is to provide assistance, if we can, to the person or family in need who comes to us. We often find ourselves negotiating with utility companies or landlords on behalf of those we are trying help. Sometimes, with the grace of God, some concessions are offered to the people we are serving. The general understanding is that once someone asks us for help, they are open to whatever form that takes. It is the Conference decision as to how far the Conference is willing to go. Our Lord comes to us in many different forms; it is up to us to discern the best way to help.

**I guess my question pertains to the fact that when “we” discuss our membership- our numbers include Contributing members and I feel that should not be the case- they are not Vincentians- they help us in our work by providing, prayer, financial and material assistance however they do not do our works. The Full and Associate members make up our numbers. When reporting to the community, would it be proper to just include the Full/Associate membership which in our case would be**

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**around xxx or should we also include Contributing members which would bring up our numbers of “total” members to approximately xxxx?**

It really depends on what you are trying to promote. If you are trying to promote the work of the Society, then maybe, Full/Associate Members is what you talk about. However, keep in mind that the work of the Society may not be possible without the Contributing Members. If you are trying to promote the Society as a whole, then you need to include all members because they all play their part. We struggle with this at National quite a bit. But we have chosen to promote all three types when talking about members. It's not about high numbers, it's about who makes the Society what it is. However, if you count contributing members, it is inappropriate to simply give the total number of parishioners.

**We have a Conference in a parish that has no pastor. Our Deacon is the parish administrator so his role is more or less the same as the pastor. He feels that he should have control over the decisions made by the Conference. Please explain what his role is in relation to the Conference.**

You will find this both in the Rule (Part III, Statute 15) and the Manual (pages 26 and 48). Ordained ministers (deacons and priests) normally hold the role of Spiritual Advisor of a Conference or Council. As such, they are asked to give spiritual guidance to the Conference members related to their own personal growth as well as their ministry. As such they can participate in any of the discussions. They may also go on home visits if they choose to. They are not the decision makers. In fact, ordained ministers may not vote or hold office or be a signor on Conference accounts.

**Our Parish is requesting that we assist with Religious Education costs to families who cannot afford the fee. The fee for each child in the amount of \$115. So if a family has 3 children, they would have to pay \$345. We recently were presented with a bill for \$2,000. I know that we cannot pay funds directly to an organization but in this case we are funding religious education for children who cannot pay the fee. The request is for our Conference to pay directly to the church.**

There are three considerations to be made here. First is that we are not to contribute funds to other organizations – that includes your parish. Second, typically, SVdP does not cover costs of education because education in the United States is available at no cost. However, in this case, religious education is different. In the original Rule of the Society developed in 1835, you will find the following under the objectives of the Conferences: “#3 To apply ourselves according to our capabilities and the time which we can spare to the elementary and Christian instruction of poor children...” The main issue in doing this is that you will have to maintain a case record for each individual student you assist. You cannot give just a lump sum to the parish. You can provide this assistance to individuals as long as you follow the normal rules. And third, keep in mind that this is a choice of the Conference and you should not simply respond to a bill for \$2,000. The parish does not define who we serve or how.