



COMMON VINCENTIAN QUESTIONS AND ANSWERS

The following **Questions and Answers** were published in the *Frederic's E-Gazette*. This is a repository of those items. An index has been created to better assist with finding answers to questions submitted to the National Council and is arranged by topic and sub topics with the date of E-Gazette publication. The index topics are arranged alphabetically by keyword for quick reference and easy research. Updated monthly, the index starts on the next page.

**62 TOPICS WITH OVER 850 QUESTIONS
AND ANSWERS LISTED**

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Society

of

St. Vincent de Paul

Council of the USA

66 Progress Parkway

Maryland Heights, MO

63043

Common Vincentian Questions and Answers

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(11/11/2013) Q: 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.

A: 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.

(11/11/2013) Q: What is the process for resolving problems at a Conference or Council?

A: 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.

(11/18/2013) Q: What should a Conference do when they have excess funds? When does the consideration of hoarding come into play?

A: 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.

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(11/18/2013) Q: 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?

A: 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.

172(12/13/2013) Q: 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?

A: 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.

(12/02/2013) Q: If something is not explicitly stated in the Rule, are we to assume we can use our good judgment to resolve the question?

A: 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.

(12/02/2013) Q: We designated our Pastor to be our Conference Spiritual Advisor but he is unable to attend every meeting. What should we do?

A: 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

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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.

(12/13/2013) Q: 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?

A: 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.

(12/13/2013) Q: 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?

A: 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.

(12/19/2013) Q: 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?

A: 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.

(12/19/2013) Q: Where exactly does it say that our pastor cannot be an officer in our Conference?

A: 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.

(01/02/2014) Q: I have been told that our Pastor cannot be a signor on our account. Where does it say that?

A: 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."

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(12/19/2013) Q: We just recently voted on a new set of bylaws. When exactly do those bylaws go into effect?

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

(01/02/2014) Q: I am struggling with a decision made by our Conference. I disagree with it. How do I deal with this?

A: 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.

(01/02/2014) Q: 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?

A: 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.

(01/10/2014) Q: 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?

A: 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.

(01/10/2014) Q: How long do we have to keep our Conference records?

A: 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.

(01/10/2014) Q: Why do Conferences have to meet so often?

A: 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.

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- 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.

(01/23/2014) Q: 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?

A: 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 for the member -- not for the person in /need. Our goal is holiness and our works of service help us to attain that -- service is 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.

(12/02/2013) Q: What is the difference between twinning and co-pays?

A: 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

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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.

(01/16/2014) Q: 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?

A: 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.

(01/16/2014) Q: 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.

A: 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."

(01/30/2014) Q: Is there a requirement to attend an Ozanam Orientation within a certain time frame to be considered an active member?

A: 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."

(01/30/2014) Q: 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.

A: 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.

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(01/23/2014) Q: 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.

A: 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-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.

(01/30/2014) Q: 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?

A: 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. 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.

(02/06/2014) Q: 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?

A: On our website, 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.

(02/06/2014) Q: 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."

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A: 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.

(02/06/2014) Q: 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?

A: 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.

The Rule, Part III, Statute 8 says: Home visits always are made in pairs. 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.

(02/13/2014) Q: 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).

A: 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.

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(02/13/2014) Q: 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?

A: 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.

(02/13/2014) Q: 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?

A: 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 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.

(02/20/2014) Q: 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?

A: 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. You are better finding someone who can fulfill the role now or just keep the position open until he is eligible.

(02/20/2014) Q: 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.

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A: 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 Elizabeth Martinez at emartinez@sudpusa.org.

(02/20/2014) Q: 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?

A: 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.

(02/27/2014) Q: This rule about meeting often -- is it something just here in our area or is it required everywhere?

A: The requirement is in our international rule. On our international website (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 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)."

(02/27/2014) Q: Our Conference has just approved a set of bylaws. Now that they are approved, what is the next step?

A: 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.

(02/27/2014) (1/24/2019) Q: Who are the voting members of the National Council?

A: 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

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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.

(03/07/2014) Q: 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?

A: 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.

(03/07/2014) Q: 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?

A: 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.

(03/07/2014) Q: 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?

A: 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 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.

(03/13/2014) Q: On the application for Aggregation form, question 8 asks when the Conference holds its assembly. What does "Assembly" refer to?

A: 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

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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.

(03/13/2014) Q: 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?

A: 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.

(03/13/2014) Q: 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?

A: 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.

(03/20/2014) Q: Since our funds are supposed to be used to serve the poor, how can we justify sending members to Regional and National meetings?

A: 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 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.

(03/20/2014) Q: 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

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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?

A: 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.

(03/20/2014) Q: 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?

A: 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.

(03/20/2014) Q: 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?

A: 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.

(03/27/2014) Q: 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?

A: 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. Click on SVdP Members and the go to the Documents menu. The Bylaws are found on the 501c3 page.

(03/27/2014) Q: 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.

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A: 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.

(03/27/2014) Q: 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.

A: 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.

(03/27/2014) Q: 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.

(04/04/2014) Q: 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?

A: 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.

(04/04/2014) Q: Is it necessary for home visitors to have background checks before they can do home visits?

A: 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.

(04/04/2014) Q: 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.

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A: The 5th 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 5th Sunday collection for the Society.

(04/04/2014) Q: 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?

A: 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.

(04/10/2014) Q: 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?

A: 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.

(04/10/2014) Q: 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?

A: 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.

(04/10/2014) Q: 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?

A: 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.

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(04/10/2014) Q: 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.

A: 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.

(04/17/2014) Q: 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?

A: 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."

(04/17/2014) Q: I understand that I need a special ID and password in order to do Annual Reports. Is this true?

A: Yes. 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. 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.

(04/17/2014) Q: 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?

A: 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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(04/17/2014) Q: 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?

A: 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.

(04/24/2014) Q: 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?

A: 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.

(04/24/2014) Q: 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?

A: 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.”

(04/24/2014) Q: 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?

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A: 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.

(05/09/2014) Q: 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 ???

A: 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.

(05/09/2014) Q: 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?

A: 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. 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.

(05/09/2014) Q: 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.

A: 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.

(05/15/2014) Q: Our Council has its own independent 501(c)(3). Is there any advantage to us to be listed in Part II of the NSGED?

A: 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

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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).

(05/15/2014) Q: 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?

A: 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.

(05/15/2014) Q: Can a Conference President appoint a member of his/her family to be one of the Officers?

A: 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."

(05/15/2014) Q: 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?

A: 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.

(05/22/2014) Q: 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?

A: 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.

(05/22/2014) Q: It is my understanding that only Presidents of aggregated Conferences can be voting members of a District Council. Is this correct?

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A: 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).

(05/22/2014) Q: 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?

A: 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 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.

(05/29/2014) Q: Can you tell me the average number of members there are in each Conference in the United States?

A: 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.

(05/29/2014) Q: 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

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conferences with EINs, or those included in the Group Exemption, have a full external CPA audit each year?

A: 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.

(05/29/2014) Q: 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?

A: 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 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.

(05/29/2014) Q: Is it possible for a Conference to be named after a person who is beatified but not yet a saint? Appreciate the clarification.

A: 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.

(06/05/2014) Q: 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?

A: 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.

(06/05/2014) Q: 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?

A: 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.

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(06/05/2014) Q: 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?

A: 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.

(06/05/2014) Q: 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.

A: 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 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.

(06/12/2014) Q: Does the newly elected Conference President need to be inducted into office by the Council President to make it official?

A: 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.

((06/12/2014) Q: When does a newly elected Conference President formally take office?

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A: 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.

(06/12/2014) Q: 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, where does confidentiality fit in? I would imagine that we're not the first Conference to encounter this. What's the policy of the Society?

A: 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, and may call again.

(06/12/2014) Q: 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: 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.

(06/19/2014) Q: 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?

A: 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 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.

(06/19/2014) Q: Does the Society have a policy related to investments that is based on moral objectives?

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A: 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.

(06/19/2014) Q: I was told that it is the policy of National that all Vincentians must be background checked and fingerprinted. Is this true?

A: 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.

(06/19/2014) Q: 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?

A: 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.

(06/26/2014) Q: 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?"

A: 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.

(06/26/2014) Q: 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 on what is a reasonable carryover each year to continue operations but not be hoarding?

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A: 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.

(06/26/2014) Q: 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.

A: 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.

(07/03/2014) Q: How are international disaster declarations handled and who issues them?

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

(07/03/2014) Q: 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?

A: 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.

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(07/03/2014) Q: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?

A: 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?

(07/03/2014) Q: 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.

A: 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.

(07/10/2014) Q: 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 numbers. One could argue that the phone numbers by themselves do not break the confidentiality. Could you give me your thoughts on this?

A: 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.

(07/10/2014) Q: 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?

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A: 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.

(07/10/2014) Q: 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 1st, rather the first year ending on September 30th. The president is unwilling to continue his presidency even for 3 months. Is this the proper way to handle this turnover?

A: 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) under Council/Conference Documents. It is called "Election Process-Conference." The Vice President does NOT simply move into the President's role.

(07/10/2014) Q: 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?

A: 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.

(07/17/2014) Q: 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?

A: 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 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.

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(07/17/2014) Q: I was looking for the Conference Meeting Agenda on the website and could not find it. Is it there somewhere?

A: 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 website under Council and Conference Documents.

(07/17/2014) Q: 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?

A: 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.

(07/24/2014) Q: 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.)

A: 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.

(07/24/2014) Q: 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.)

A: 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.

(07/24/2014) Q: 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?

A: 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.

(07/24/2014) Q: 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?

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A: 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.

(07/31/2014) Q: Diocesan Council Presidents are required to attend National and Regional meetings. (I cannot find this anywhere.)

A: 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."*

(07/31/2014) Q: 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?

A: 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.

(07/31/2014) Q: 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 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?

A: 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

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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.

(07/31/2014) Q: What is the Rule “number” for proxies voting in the place of a Conference President, in a District Council Election?

A: 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.*

(08/07/2014) Q: 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?

A: 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.

(08/07/2014) Q: 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?

A: 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.

(08/07/2014) Q: Is there anything short of an appt. with a priest that we may consider "Spiritual Aid"?

A: “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.”

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(08/07/2014) Q: 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)?

A: 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.

(08/14/2014) Q: 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?

A: 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.

(08/14/2014) Q: 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?

A: 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.

(08/14/2014) Q: Is there an age limitation related to the election of Council or Conference President in the Rule?

A: 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.

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(08/14/2014) Q: 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?

A: 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.

(08/21/2014) Q: 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?

A: 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.

(08/21/2014) Q: 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?

A: 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.

(08/21/2014) Q: Could you give me some idea of what may be covered under "Other In-Person Visits"?

A: 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.

(08/21/2014) Q: 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?

A: 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 Committee) regularly informs

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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.

(08/21/2014) Q: 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?

A: 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.

(08/28/2014) Q: Do Conferences give financial help for attending private schools?

A: 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.

(08/28/2014) Q: 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?

A: 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.

(08/28/2014) Q: Is it acceptable for a Council President to also carry the office of Conference President?

A: 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.

(08/28/2014) Q: 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 for the September

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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?

A: 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.

(09/04/2014) Q: What is the Society's stand on comingled funds and parish collections?

A: 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.

(09/04/2014) Q: 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.

A: 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.

(09/04/2014) Q: Our Conference has closed our Thrift Store and we want to gift the building to our parish for a dollar. Is this okay?

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A: 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 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.

(09/04/2014) Q: Who is the official spokesperson for the Society? Where will I find this in the Rule?

A: 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.

(9/11/2014) Q: 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?

A: 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.

(09/11/2014) Q: Does National plan to provide special instructions for Conferences for filling out their annual 990 that needs to be sent to IRS?

A: 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.²

(09/11/2014) Q: 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?

A: 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

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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.

(09/11/2014) Q: 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?

A: 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.

(09/18/2014) Q: Why are memorial donations to be categorized as Fund Raising as opposed to being listed as Other Income on the Annual Report?

A: 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.

(09/11/2014) Q: 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?

A: 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.

(09/18/2014) Q: 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

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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.

A: 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 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.

(09/18/2014) Q: 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 ?

A: 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.

(10/03/2014) Q: 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?

A: 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."

(10/03/2014) Q: Are annual audits required? Under what rule or bylaw? If under bylaw, what if the Conference or District has not adopted the bylaws?

A: 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.

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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."

(10/03/2014) Q: 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 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?

A: 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.

(10/03/2014) Q: 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: 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.

(10/03/2014) Q: Does the Rule allow the Society to actively support passage of a levy?

A: 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.

(10/09/2014) Q: Is it permissible to give cash to someone asking for help?

A: 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.

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(10/09/2014) Q: Is it permissible to give direct assistance to those in need from a thrift store?

A: 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.

(10/09/2014) Q: In the event of a tie vote does the conference President have the authority to cast a deciding vote?

A: 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 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.

(10/09/2014) Q: 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?

A: 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.

(10/09/2014/2014) Q: 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.

A: 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.

(10/16/2014) Q: 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?

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A: 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.

(10/16/2014) Q: 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?

A: 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...

(10/16/2014) Q: Can an associate member of SVDP sign food pantry checks?

A: 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.

(10/16/2014) Q: 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.

A: 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.

(10/16/2014) Q: 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

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allow certain Vincentians to attend the store committee meetings. Is it permissible to exclude conference members from a sub-committee?

A: 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.

(10/23/2014) Q: Can a conference donate to a local food pantry if it is not SVDP run?

A: 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).

(10/23/2014) Q: 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?

A: 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 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.

(10/23/2014) Q: 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?

A: 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."

(10/23/2014) Q: 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?

A: 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

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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.

(10/23/2014) Q: Who is responsible for filling out the Conference annual report?

A: 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.

(10/30/2014) Q: 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?

A: 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.

(10/30/2014) Q: 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.

A: 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.

(10/30/2014) Q: 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?

A: 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.

(10/30/2014) Q: 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?

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A: 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.

(11/06/2014) Q: 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?

A: 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.

(11/06/2014) Q: 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 very highest, which award next, etc.? Also, is there someplace I could find this defined?

A: 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.

(11/06/2014) Q: 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?

A: 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.

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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."

(11/13/2014) Q: 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?

A: 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.

(11/13/2014) Q: 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?

A: 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.

(11/13/2014) Q: Are Members allowed to use any of the Society's resources (food, clothing, etc.) for their own personal use?

A: 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 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.

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(11/20/2014) Q: 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.

A: 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.

(11/20/2014) Q: 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.

A: 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.

(11/20/2014) Q: 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?

A: 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 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 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 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.

(11/26/2014) Q: 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?

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A: 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.

(11/26/2014) Q: 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.

A: 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.

(11/26/2014) Q: 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?

A: 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.

(12/04/2014) Q: 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 around xxx or should we also include contributing members which would bring up our numbers of “total” members to approximately xxxx?

A: 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.

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However, if you count contributing members, it is inappropriate to simply give the total number of parishioners.

(12/04/2014) Q: 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.

A: 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.

(12/04/2014) Q: 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.

A: 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.

(12/11/2014) Q: I have a question concerning the selection of Board Members who are appointed by the President of the Diocesan Council. I have been looking through the Rule, the Manual and the By Laws and I do not see any comments that cover who can or who cannot be appointed to the Board. I did see a comment that Officers of the Council must be Vincentian Members but I am not clear what that means as regards Board Appointees. Can you give me any guidance?

A: I don't have a copy of your Council's bylaws, so I don't know if there are any restrictions in it. We have asked all Councils to adopt the nationally approved bylaws, but not everyone has. I can give you what is recommended, but ultimately you must follow your Council's bylaws if they are specific. Generally: It is recommended that all Board Members be Vincentians. That is easily handled as far as District Presidents. Under the nationally approved bylaws, you may appoint a number of board members equal to the number of District Presidents. Officers of the Diocesan Board do not have to be District Presidents, you may appoint other Active Vincentians as officers; but whoever you choose as an officer must be an Active Member. It is possible to appoint Board Members who are not Vincentians as long as the majority of the Board consists of Active Vincentians.

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(12/11/2014) Q: In the bylaws it says an active member “participates regularly in the prayer life, meetings, and charitable activities...” Associate members on the other hand either accept the rule but may not be Catholic or doesn’t attend regular meetings, “nor” engage in the works on a regular basis. My question pertains to the wording of “and” and “nor.” I don’t see where someone fits in that publicly accepts the Society’s Rule, belongs to the Catholic church, engages in the Society’s works but is unable to attend meetings regularly. I have members in my council that are very active in the store, do home visits, attend church regularly, accept the Rule, but their schedule does not permit them to attend meetings. I would like to know where they fall. Personally I feel that some of these members do more than certain active members that attend regular meetings. I find the “charitable activities through personal contact” more important than making it to meetings. I do not mean any disrespect to those attending meetings on a regular basis but I think those unable to make it to meetings need a voice too.

A: The term “Active Member” does not refer to busy-ness or activity. Actually the term is “Active (Full) Member.” An Active (Full) Member is one who (in summary)

1. Is Catholic
2. Attends meetings regularly
3. Participates in the activities, works and life of the Conference.

All three are important to be an Active Member. If #1 or #2 is missing, they are Associate Members. The objectives of the Society are growth in holiness, community, and service. The Conference meeting is one of the only times when all three come into play. That is why the meeting is so important. And Active Members are expected to attend the far majority of all meetings – not just an occasional one. The spiritual growth of the members is the primary goal of the Society. The works that we do help us to achieve that growth, but they are not what we are all about.

(12/11/2014) Q: I am a District Council President and I am in my last year of six as President. We are in the process of reorganizing and hope to end up with a Diocesan Council and a number of District Councils. We will hold an election for President of the Diocesan Council. As I understand it, I cannot be a candidate since I am just completing a six year term and have to wait three years before being eligible to run again.

A: Technically, you would be eligible. You are currently a District Council President. You would be eligible to run for Diocesan Council President - it is technically a different role. And you would be eligible for two three year terms.

(12/18/2014) Q: Recently, it was stated that “twinning” was officially defined by the Society as: an arrangement between Conference A to send a specific amount of money each month to Conference B which has need of additional income on a regular basis. Is this correct? If so, what do we call any help one Conference provides another conference for a client on a one time basis?

A: The specific definition you gave is reasonable; however, it is not limited to monthly contributions. Really, it qualifies for anytime one Conference or Council sends money to another Conference or Council to help the Conference do its works. For example, if you send \$500 to another Conference to help them in whatever way they determine, that is twinning. In the case of giving money to another Conference to help in a particular case, that would qualify as client aid (a co-pay) because you are helping an individual

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even though it is through another Conference. In this case, it would be appropriate for you to have a case record for the person or family helped.

(12/18/2014) Q: We are an agency of Second Harvest. We have held two mobile pantries, one serving 250 families and the other 200. Is this a figure we need to put in our In Kind food column? We also give out food every third Thursday that is provided by Second Harvest. We average 35 families. We have just started this a few months ago. Please advise if/how we would report this on the Annual Report. Not sure if I could be accurate on the value.

A: Unless you have a special arrangement with Second Harvest, the food you get from Second Harvest is purchased, so it is not in-kind. When you say that you "also give out food every third Thursday that is provided by Second Harvest," do you mean that Second Harvest is doing the distribution and you are helping, or that Second Harvest gives you the food free of charge and you are distributing? If it is the first, then you don't record anything except your time. If it is the second, then you record the food distributed as in-kind.

As far as the value is concerned, take a typical bag or box that you distribute and evaluate each item and come up with the best guess as value for the box or bag. Then use that same amount as best guess for all bags/boxes. Best guess is all we can ask for.

(12/18/2014) Q: At a recent multi-conference gathering, someone suggested that if someone in need requests assistance more than once, the individual will be asked to perform some sort of "community service" in order to be served beyond the initial time. This service might include stocking shelves at a local food bank, tending a community garden, or some other similar task. Is this in keeping with either the spirit or the letter of the Vincentian Rule?

A: The works of the Society have always been in imitation of Jesus. The assistance provided by Jesus was unconditional. He did not require those He helped to do anything in order to receive His assistance. "Systemic Change" is misinterpreted as you described in your question. "Systemic Change" calls for us to work on systems toward helping those in poverty to move out of poverty, to reduce or eliminate rules and systems that keep people buried in poverty, to change systems – not to impose more of a burden on those we serve. Once you require someone to do work in order to receive something in return (food, clothing, furniture, rent payment, utility bill payment, etc.), it falls into the realm of an employer-employee relationship and then there are laws that have to be followed in that respect. What you are describing is not something the Society endorses.

(01/08/2015) Q: Are there any guidelines regarding reimbursement of Vincentians for attending national and regional meetings? Who is eligible, what is covered, what about spouses, what about side events (trips, golf, etc.), etc.?

A: If a member is designated as one who must attend a national or regional meeting, then the Council to which the member belongs is expected to pay the expenses for the trip. This is only for the member who is expected to attend. It does not cover spouses and it does not cover extraordinary expenses or side events unless the event is a necessary part of the gathering. If a Council or Conference chooses to sponsor anyone else to attend, they may do so and set their own guidelines for what is covered.

(01/08/2015) Q: If a conference is going through some difficult times due to behaviors from an officer that are against the most basic and fundamental values of the Society, is it proper to involve the

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Spiritual Advisor? I have checked The Rule as well as the Manual. Personally (and this is shared by some other members) I believe we are obligated to involve our Spiritual Advisor, as I am concerned about the Spiritual health of the members and the conference. Is this proper?

A: One of the most important functions of a Spiritual Advisor is to help all of the members keep things in perspective (spiritually and in service). Yes, it would be important to include the Spiritual Advisor. Also, keep in mind that only the President is an elected position. All other officers are appointed by the President who may remove them from office if they are not fulfilling their roles properly and appoint someone else.

(01/08/2015) Q: If a Vincentian moves to a new parish, can they remain with the conference in their old parish or should they join the conference in their new parish?

A: Members of the Society should affiliate themselves with their local parish Conference and Diocese. This will allow the member to continue to be considered a full-time active member. Thus if the member moves to a new parish, so should their membership record be moved to a new Conference. However, there is nothing in The Rule that requires a Vincentian to be a parishioner of the parish where the Conference exists. There is also nothing in The Rule that would prevent a person from being a member in multiple Conferences. Also, it is possible for the pastor of a parish to make a restriction for only his parishioners to be involved in ministry in his parish. If he so decides, we must honor that.

(01/15/2015) Q: Can a member of the Greek Orthodox Church be an officer and/or a Spiritual Advisor in our Conference?

A: When The Rule was approved internationally in 2003, each country was given the option of accepting the allowance of non-Catholics as officers as defined in Part 1 of The Rule. The United States decided that only Catholics may be officers of the Society. So it is important to understand that only Catholics can be Active (Full) Members and only Active (Full) Members may be officers. It is also important to understand that only Catholics may be Spiritual Advisors. There are certain eastern rites that are in full communion with the Catholic Church. Members of eastern rite churches are welcome as Active (Full) Members. However, the Greek Orthodox Church is not in communion with the Catholic Church; therefore, the individual you speak of cannot be an officer or a Spiritual Advisor. He/she can be an Associate Member.

(01/15/2015) Q: Our conference has a formal meeting once a month where all members are invited to share information, minutes are taken and a treasurer's report is given. We also come together in smaller groups, twice a week to serve the poor. Although all activity occurring at these smaller group meetings are documented, we do not take minutes or give reports. I have heard conflicting information regarding which of these gatherings of members count as meetings for reporting purposes. Can you clarify?

A: In order for a meeting to count, it must have the following:

- A quorum (a majority of all Active Members) must be present
- Spirituality: Opening prayers, closing prayers, and the spiritual reading and discussion
- Fellowship: sharing among the members in discussion and/or work
- Service: charitable work performed and/or discussed

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The Rule requires two of these meetings regularly scheduled each month. The Rule, Part III, Statute 7 gives you a typical agenda for a Conference meeting, although the agenda does not have to be followed exactly as long as the above are fulfilled.

(01/22/2015) Q: Is it permissible for non-Catholic Associate Members to be Members of our Board of Directors?

A: From a general standpoint, non-Catholics may not be officers. That is confirmed in the Rule. It is not uncommon within the Society to have members of the community (non-Vincentians) as Board Members. Those members of the community may or may not be Catholic. Keep in mind that the majority of Board Members must be Active Members of the Society. This should be defined in your Bylaws.

(1/22/2015) Q: Someone asked me about the requirement that active members be practicing Catholics and what “practicing” Catholic would mean. Officers of course are one thing but as I recall The Rule is not definitive about this. I recall, however, that when Bishop Conway was National Episcopal advisor he was very firm that if we wanted the support of the bishops we needed to require active members to be practicing Catholic and in Communion with us. I am interest in your take on this.

A: There is nothing in The Rule or Bylaws that requires an Active Member to be a “practicing” Catholic. The interpretation of this is too subjective. I have not seen anything to show what that really means. We don’t take roll call or do sign in at Mass so we don’t know how often an individual attends Mass or goes to Communion or confession. For those registered in a parish, we have some sacramental information. We don’t go by “practicing” Catholic because it is too hard to determine or track.

(01/29/2015) Q: We have an issue arise with a conference regarding non-Catholic membership and voting for a new conf. president. We know that non-Catholics are allowed to join conferences and participate in conference activities. It is my understanding that they cannot become officers. However, are they allowed to vote in an election for conference president?

A: There is nothing in the Rule that specifies voting eligibility. However, the Nationally Approved Bylaws for Conferences says that each Active Member of a Conference has one vote and that vote must be cast in person. Non-Catholics may not be Active Members; they can be Associate Members and, therefore, cannot vote.

(01/29/2015) Q: At times you mention Conferences that have BYLAWS, etc. We do not have any. Should / Must we have them? We feel that following the Rule and Manual suffice.

A: In 2003, the Society approved a new Rule. The U.S. version of The Rule (Part III) was formally approved in 2005. The old Rule contained both philosophy and structure of the Society. When the new Rule was created, structure was removed and put in a separate document called Bylaws. When this was approved in 2005, it was expected that all Conferences would formally adopt the appropriate set of bylaws and use those with The Rule and Manual. "Document 1: Conferences without Boards of Directors" is appropriate for 99% of all Conferences. The National Council considers Bylaws to have the same force and authority as The Rule.

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(01/29/2015) Q: If abuse or neglect is noticed on a Home Visit, are we required to call authorities? If we don't, can the Society be held responsible and then be sued afterwards by the victim?

A: In the case of abuse or neglect, there is no legal responsibility for a Vincentian, although many social workers at various agencies are legally bound to report. Then, you have to consider this from a moral standpoint. Do you have a moral obligation to report? This is a choice you have to make. But, please keep in mind, that generally when you call Child Protective Services (CPS) or Adult Protective Services (APS), they will take the information and check into the matter. However, you will never hear back from them as to any investigation or results. The only time they may get back with you is if they have to verify something you told them. CPS and APS don't reveal the source of their information so it is unlikely that anything will come back to the Society or the visitors.

(01/29/2015) Q: Additional information related to this question from last week: If abuse or neglect is noticed on a Home Visit, are we required to call authorities? If we don't, can the Society be held responsible and then be sued afterwards by the victim?

A: In the case of abuse or neglect, there is no legal responsibility for a Vincentian, although many social workers at various agencies are legally bound to report. Then, you have to consider this from a moral standpoint. Do you have a moral obligation to report? This is a choice you have to make. But, please keep in mind, that generally when you call Child Protective Services (CPS) or Adult Protective Services (APS), they will take the information and check into the matter. However, you will never hear back from them as to any investigation or results. The only time they may get back with you is if they have to verify something you told them. CPS and APS don't reveal the source of their information so it is unlikely that anything will come back to the Society or the visitors.

I have been informed that in one particular state, SVdP was informed by the Attorney General's office, that members are mandated to report elder abuse. In another state, SVdP has chosen to internally mandate the reporting since they are not sure if they are mandated by the law to report. Another Vincentian felt that my response related to moral obligation was not strong enough.

It is difficult to provide an answer that covers all 50 states and all 180+ dioceses in the U.S. Here is what I recommend that you do in relation to suspected child or elder abuse. The laws in each state will vary but will generally follow a particular theme. The Society has made a commitment (Resolution 91 passed by the National Council in 2011) that our Vincentians will follow the policies related to Safe Environment defined by each diocese. The policies may vary slightly from one diocese to the next; however, they will generally follow a similar theme. Please contact the office in your diocese that is responsible for the Safe Environment policies and seek their guidance. The fact of the matter is that none of us wants to see a child or a vulnerable adult abused and we should do whatever we can appropriately do to protect someone we suspect is being abused. Again, contact the office for Safe Environment in your diocese to determine what action you should take and when. One important aspect of seeking advice from your diocese is that they can give you specific contact numbers to use.

(02/05/2015) Q: When attending a Midyear meeting, does the National Council member have to be from a Council that is "instituted?"

A: Article 16 of the National Bylaws clearly states: "Each National Council member has one vote." So in order to vote or effectively participate in any meeting, you must be a National Council member or his/her valid proxy. Article 11 refers to membership in the National Council being Presidents of

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“instituted” Councils. So, whether it is the Midyear or the annual National Assembly, the requirement is that the voting member must be from an “instituted” Council.

(02/05/2015) Q: A question has come up at our conference about the need to have two members interview a client. We make some home visits and for the most part interview clients at our office. Sometimes, at the office, a single member interviews. Your thoughts?

A: Interviews with those in need require two Vincentians, whether in their home, in an office, or at a mutually agreed to location. Person-to-person member visits with those we serve should always be in twos. This also includes the occasional times when members provide transportation to those seeking help (i.e. taking someone to a doctor’s appointment). One other consideration is if your Conference is covered by our National Group Insurance program. Doing our activities in twos is part of our basic Vincentian philosophy. Doing things contrary to the Vincentian way could nullify insurance coverage.

(02/05/2015) Q: One of my new District Council Presidents is asking for a meeting template --- I searched my copies and I do not have one. Is there such a thing? I know the Rule has the Conference Agenda.

A: On page 36 in the Manual, it states that The Rule, Part III, Statute 7 has the agenda that should be used for Council Meetings. This is the same meeting agenda as expected of Conferences. Every Council has its own set of special considerations and the agenda should be modified at each Council to accommodate its special programs and needs.

(02/12/2015) Q: I am contacting you as president of a fairly new conference. We are currently in the process of completing our application for aggregation. We are also getting off the ground with our newly formed council. Both our new conference and new council will need insurance. We discussed it today at our conference meeting and all members agreed. I am wondering if our conference and council can be covered by the same policy.

A: As far as the National Group Insurance is concerned, each entity (Council, Conference) would have to be covered separately. If you sought out a separate insurance policy (not the National Group) for the Council, it can be established to cover Conferences as well.

(02/12/2015) Q: The LDS church has contacted our Conference offering volunteers to help with our service. I know there are major doctrine differences, so would like to know how SVdP responds to such a request.

A: The possibilities of their assistance really depend on what your Conference does. Members of the LDS church (as well as others) can be Associate Members, meaning they can participate in the works and possibly attend meetings (without a vote), but they cannot be officers. If your Conference has special works, such as a pantry or a store, they can assist in that. Or if your Conference has special seasonal programs such as Thanksgiving or Christmas, they can help with that. It is possible for them to accompany an Active Member on home visits. It would not be appropriate for them to go on home visits by themselves (because evangelization is one of their key principles) unless you have their absolute assurance that they would not proselytize. If you want to allow them to go on home visits, then it is important that they be thoroughly trained in how Vincentians do home visits. Then, only let them go if your Conference is comfortable with it.

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(02/12/2015) Q: When the executive committee meets and a question of utmost importance if considered, can the committee agree with a consensus, or does a motion need to be made, seconded, discussion and vote? I'm confused what a consensus means.

A: The Rule, Part I, Article 3.10 calls for decisions to be made by consensus: "All decisions are made by consensus after the necessary prayer, reflection and consultation. The democratic spirit is fundamental at all levels of the Society and, when appropriate, matters are put to a vote." Consensus means that, if it is clear that everyone is in agreement (no matter if the decision is "yes" or "no"), then no formal vote is necessary. However, that does not mean that an important decision is not to be recorded in the minutes. This also means that, if it is clear that not everyone is in agreement, then a vote should take place. In either case, the motion and resulting decision must be recorded.

Another consideration is the executive committee. Executive committees typically have limited authority to make decisions, since decisions within a Conference or a Council are to be made by the members. The charter for an executive committee usually defines the type of decisions they are allowed to make.

(02/19/2015) Q: Can you cite the portion of the bylaws that does not allow us to hire anyone with any sexual charges?

A: There is nothing in The Rule or bylaws that explicitly prohibits this. However, in 2011, the National Council passed Resolution 91 which states: *"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."* Usually, this is part of the consideration that comes into play throughout each diocese when it comes to ensuring a safe environment for children and vulnerable adults. People look upon the members and employees of St. Vincent de Paul as trustworthy, someone who is safe to be around. We need to ensure this is true.

(02/19/2015) Q: The owner of a nearby motel that we use said she will be charging us a \$150 security deposit for anyone we assist that stays at the motel. Our problem is that we do not think this is a good use of funds, as it is transitional housing and considered more emergency housing since there is no lease or long term commitment. Some Vincentians think it's no big deal as we would pay a security deposit for someone moving into an apartment with a lease. Some Vincentians think it is a bad use of our funds as it is typically short term emergency housing and the deposit would complicate matters, and that it's not our mission to guarantee a tenant's behavior, and that would be a bad precedent to set. Some of us believe we can handle it on a case by case situation, but others still want our policy defined.

A: There is no policy on this. Each Conference establishes its own operating guidelines. There are strong arguments that can be made in either the pro or con of giving security deposits. The normal trend is not to offer them. However, we should never make our decisions based on the fact of "we always do..." or "we never do..." Our decisions should be on a case by case basis with the Conference deciding if the deposit is appropriate for the circumstances. I agree "that it's not our mission to guarantee a tenant's behavior." Hopefully, you can work out the details with the motel ownership or find a different motel.

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(02/19/2015) Q: We have a Food Pantry at our Parish and as long as I can remember it's been SVdP Food Pantry to our Parish and our community. I am told by our District President that it isn't SVDP Food Pantry but our church's pantry run by Vincentians and funds from our SVdP account cannot be used to purchase food. Can you please clarify?

A: Your District President is correct in that we are not permitted to give funds to outside organizations. However, it looks to me like the key is in the phrase "run by Vincentians." If the pantry is indeed run by Vincentians, it is a work of the Society and can be funded by the Conference. Keep in mind though that, if the phrase is only used loosely and if a member or two only occasionally help out, then this does not qualify as a SVdP work. This must be one of the primary activities of the Conference in order to qualify.

(02/26/2015) Q: One of our Conferences noted that in the SVDP Manual on page 10 (2nd to last paragraph), there is mention of "obtaining plenary indulgences on the day of their admission to the Society..." We were wondering if there is a special SVDP ceremony that will suitably achieve the granting of the indulgence on the participants. I could not find anything in the "Vincentian Celebrations" Manual. We are looking for an official description of such a ceremony that would result in the granting of the indulgences.

A: There are no ceremonies associated with indulgences. You fulfill the requirements of the indulgences and they are granted – not by us, but by God. The requirements are specified in that paragraph in the Manual.

(02/26/2015) Q: I am updating my Ozanam Orientation briefing material and have a question for you. I think you told me once that at our National Council there are about 117 votes that could be cast. Do you know approximately how many votes can be cast at our General Council in Paris?

A: According to The Rule, Part II, the Presidents of all instituted Superior (National) Councils or Assimilated Councils are voting members of the international Confederation. Assimilated Councils are lower level Councils or Conferences that have been officially designated as representing the country they are located in. We are located in 150 countries and potentially have 150 voting members. I don't know exactly how many there are at this point in time. As is the case in the United States with our National Council Members, even though they are eligible to vote, they don't always attend the meetings because of various reasons.

(03/05/2015) Q: Can you give me some examples of how The Rule was changed several years ago in regards to more emphasis on spirituality?

A: I'm sorry that I don't have the time to address this fully, but let me just touch on a couple of points. In the old Rule and Manual, there were essentially less than a handful of mentions of spirituality. The second charter in Part I addressed spirituality. The Rule also indicated briefly the need for a Spiritual Advisor. And the Conference meeting agenda included a spiritual reading and discussion. The Manual also had occasional mentions of spirituality. In the new Rule, Part I has several Articles (2.1 through 2.6) specifically related to spirituality. Then Part I continues with additional articles spread throughout referencing our relationship to the Church and the Church's social teachings. Part III addresses spirituality in the first four statutes and then liberally throughout the rest of Part III. The Manual devotes essentially the entire second half of the book to spirituality.

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(03/05/2015) Q: A question came up at a recent meeting I was at and I thought you could provide me with an 'official' answer. I know that religious are not able to be SVdP members (except as spiritual advisors). However, someone mentioned to me that retired priests can be members. So my question is: Can a retired Pastor be a member and/or officer of the Conference after retirement?

A: First of all, "religious" are allowed to be full members. Nuns or professed religious brothers may be Active Members including holding officer positions. The prohibition in The Rule refers to the "ordained," meaning Bishops, Priests, and Deacons. The prohibition does not prevent them from going on home visits or doing the other things Active Members do. The "ordained" cannot be officers or signors on the Conference accounts. A retired Priest is still an "ordained" Priest and a retired Deacon is still an "ordained" Deacon and are, therefore, prohibited from being officers or signing checks. Also, they are not allowed to vote.

(03/05/2015) Q: Do you think it makes a difference which way a Council names itself?

A: Technically, the standard that we have been presenting to people when they ask about (Arch)Diocesan Councils is "Society of St. Vincent de Paul, _____(Arch)Diocesan Council" or "Society of St. Vincent de Paul, (Arch)Diocesan Council of _____." Either form is acceptable. Both acknowledge that it is part of the Society. We use a similar format for District Councils. One additional consideration is made when naming an (Arch)Diocesan Council. The name should reflect the name of the Diocese it represents. Unlike a District Council, an (Arch)Diocesan Council covers the entire diocese – not just a part of it. In addition, its name should not encompass more than its diocese.

Occasionally, Councils have been known to misname themselves. By the formal structure of the Society, (Arch)Diocesan Councils have District Councils reporting to them (not Conferences). District Councils have Conferences reporting to them. Sometimes a District Council names itself a Diocesan Council and this can cause confusion, especially in reporting.

(03/05/2015) Q: A conference member asked the question: is the Festival Celebration a mandatory rule that the conferences and/or council must schedule during the calendar year.

A: The Rule, Part III, Statute 9 states: *"Conferences and Councils celebrate liturgical ceremonies, particularly Vincentian ceremonies, throughout the year, endeavoring to maintain a spirit of friendship among the members. The Council of the United States has designated six days for religious observances. On these occasions, the members of Conferences and Councils demonstrate the spiritual nature of the Society by attending the Eucharist together:*

- + *Ozanam Sunday (the last Sunday of April)*
- + *The feast day of Blessed Frederic Ozanam (September 9)*
- + *The feast day of St. Vincent de Paul (September 27)*
- + *The Immaculate Conception, Patroness of the Society (December 8)*
- + *A Conference Mass celebrated at least once a year for all members, including spouses and children. During this Mass, it is most appropriate to commission new members into the Conference, pray for those we have visited, pray for our benefactors, pray for the poor, pray for the deceased members, and for continued good work.*
- + *Another feast day of local custom, e.g., December 12, the Feast of Our Lady of Guadalupe."*

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The celebration of the festival days develops spirituality and fellowship among the members. It is also a sign of solidarity with all of the other members of the Society throughout the United States. It is not likely that any formal action will be taken if a festival day is not celebrated.

(03/12/2015) Q: Reading the Minutes from one of our Conferences, I spotted the following and wanted your feedback if it was alright for them to proceed in this fashion: “more money will be coming from Mrs. XXX’s bequeath of the \$45,000 we did receive, \$15,000 will be put into our general fund and the balance of \$30,000 will be put into 3 CD’s with different maturity dates.” Is this ok?

A: It is okay to put money in CDs as long as there is a specific plan for reducing those funds to zero. Our purpose is not to build bank accounts or earn interest. The issue of hoarding comes into play when decisions are made to keep money in the bank instead of helping someone in need. Will the Conference readily cash in the CDs in order to help those in need rather than allow the CDs to go to maturity? Conference funds are not to be used for “endowments” unless the funds were specifically collected for that purpose with the donor’s knowledge and intent.

(03/12/2015) Q: I read with interest your article entitled, "Vincentians - Always Two". I understand the concerns you raised regarding both safety and comportment. Nonetheless, it is difficult to argue at the local level on behalf of the principles of two people per home visit and two people per office visit if these tenets are not specifically addressed in the very extensive list of Society Rules that exist. Did I simply miss those 'rules'? If so, could you please refer me to the section and article number where they are written. If there are no 'rules' that directly address these issues, which you describe as ostensibly central to the dogma of the organization, what explanation can you provide for their absence?

A: The following are instances in The Rule and Manual where working in pairs is the standard of the Society.

The Rule, Part III, Statute 8: Home visits always are made in pairs.

Manual, Page 7, Origins of the Society: Members of the Society, Vincentians, went two by two to the homes of the poor to respond to their needs.

Manual, Page 23, Home Visitation: Vincentians always visit in pairs. This practice emphasizes the Conference’s status as a community, not a collection of individuals who “do their own thing.” The visiting team is ideally composed of Vincentians of both genders, various age groups, and different life experiences, so that a better perspective of the needy person’s situation can be gained, and various courses of action explored. From the beginning, Vincentian visitation to the needy was done in pairs for the protection both of the needy person and the members. The precedent was set by Christ Himself, when He sent out the Apostles two by two (MK 6:7). The Society wisely continues this tradition in the interest of safety, liability, and propriety.

In addition, 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.

(03/12/2015) Q: Who makes up the executive board of a conference?

A: There normally is no executive board for Conferences. The Manual and Rule speak of a Conference board. This is not a formal Board of Directors. It is also not an Executive Board which has specific authority granted to it. The Conference board is simply the slate of officers (President, Vice President(s),

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Secretary, and Treasurer). They have no specific authority other than representation of the Conference and requirement to fulfill specific tasks. All decisions are made by the Active Members of the Conference as a whole.

(03/19/2015) Q: I attended the Invitation for Renewal several weeks ago. They gave everyone a copy of the Vincentian Leadership “Governance: Council and Board.” I have a question: Are all new programs to be approved by Conference Presidents? (The Board) Or can a Community Board approve new programs, without the approval of Conference Presidents? On page 45, second paragraph, “No program should be allowed to start without Board approval. This includes both those started by Vincentians and those started by employees.”

A: The Board of Directors or the Council (if no formal Board of Directors exists) is the governing body and should give formal approval of new programs. The term “Board” is sometimes used informally among Vincentians to refer to the slate of officers. The book does not use the word that way. The book refers formally to the Board of Directors.

(03/19/2015) Q: Does a Conference have to have Insurance if the Parish/Church has it? My understanding is that each Conference must have Insurance as well as the Council.

A: If the parish has liability and Directors/Officers insurance that covers the Conference, then it is not necessary for the Conference to have that coverage separately. But, that is something that has to be clarified. The Council may acquire the appropriate liability and D&O coverage and include its Conferences. If neither condition exists, the Conference has an obligation to have coverage. The National Group Insurance program is designed for this but only covers Conferences doing the typical SVdP work. It does not include property coverage or any work that is considered non-typical such as a meal program. This holds true for Councils as well.

(03/19/2015) Q: Our Conference is growing and thriving. The Home Visit of clients by two Vincentian members is the core of our work. We presently have 15 check signers and 7 debit card holders. With 10 more members who are not authorized to sign checks, it is increasingly difficult to match a check signer every week. We just completed a training session for 7 new members with more on the horizon. Can you give us suggestions on how other Conferences handle their distributions of funds on behalf of clients?

A: The typical Conference will leave the check signing to the Treasurer. They will make whatever arrangements are necessary for the payment to be made and then turn the details over to the Treasurer. Having a home visit team approve payments of bills is normal practice, but there is no official rule or procedure that requires a home visit team to issue checks directly. Having 15 check signors and 7 debit card holders is an auditor's nightmare. There is no accepted accounting practice that allows for that.

(03/26/2015) Q: We partner with various organizations in addressing the needs of our clients. After visiting the client we then agree with the other organization to share the costs. On occasion the other organization will pay the whole bill (as a result of the agency only accepting a full payment from a single source or as a result of fund availability, timeliness and urgency). We then reimburse the other agency for our portion of the agreed upon payment. We indicate on the check the name of the client for which the amount is tendered. Are we acting within the spirit and intent of the Rule?

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A: Yes, you are. You are providing a co-payment on behalf of a specific person or family. You are not making a general contribution to that organization. This is not a violation of The Rule.

(03/26/2015) Q: We have a small SVdP chapter and our volunteer numbers are limited even as our client numbers continue to increase. We have always followed the two by two rule in any home visit, public presentations, recruiting etc. However, a discussion has come up as to if this rule applies to the client/Vincentian interview. We always have two interviewers present but one interviewer assists one client while the second one aids the other. We, of course, consult with each other if two heads and/or a larger decision is needed. Is this appropriate to do?

A: Two Vincentians must be involved in each interview – not just having another Vincentian somewhere in the area. The two by two rule is not only about safety. Two Vincentians need to be involved in praying with the client (if possible), asking the questions, hearing the answers, seeing the body language, evaluating the interview, and making the decisions. Our goal is not efficiency in service. It is efficacy in service.

(03/26/2015) Q: When a fellow Vincentian moves here from another state, are they required to go through the same installation process as one who has never belonged to the Society?

A: National Council Resolution 93 requires that all Vincentians take the Ozanam Orientation within their first year of becoming a member. If there is some record that shows this member has already gone through the training, then this can be skipped. Other than that, it is up to your Conference to be comfortable with and accept the new member.

(04/02/2015) Q: Our Council has just approved a set of bylaws. Now that they are approved, what is the next step?

A: The bylaws you approved should correspond to the bylaws for Councils approved by the National Council. Be sure that you have a record of the approval and copy of the bylaws in your Council minutes. Next, send a copy of the bylaws through the organization chart to Diocesan Council and/or the Regional Vice-President for their approval, recording and filing. The Diocesan Council (if appropriate) should also record their approvals in their minutes.

(04/02/2015) Q: You indicated in the past that it is improper for one member to hold multiple offices within a Conference, such as President/Treasurer or Secretary Treasurer. I can see value in this, but what is the basis for this?

A: This can be addressed in multiple ways.

1. The Rule, Part III, Statute 12 states: *Each Conference or Council should have at least a Vice President, who exercises all the functions of the President when the latter is absent, a Secretary and a Treasurer all of which are appointed by the President after consultation with the members.* The statement implies and identifies three distinct individuals.
2. 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*

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issued by the Board of the Council General. It is the tradition of the Society that all officer roles be served by individuals – no combinations.

3. It has always been stressed in the Society (tradition as well as in the old Rule and commentaries) that the President should not take on excessive tasks and duties that add stress to his/her role. It has always been promoted that the tasks/responsibilities be delegated to individual Active Members.

(04/02/2015) Q: I need help understanding membership. I understand Active (Full) Members and Contributing Members. I don't understand Associate Members. I may not be looking in the correct place; however, all I've found in the Rule is one paragraph on Associate Members. What is the "formal action of the Conference or Council"? There must be some sort of checking we as the Conference must do?

A: The one paragraph in The Rule, Part III, Statute 3 is generally it. In summary, an Associate Member is someone who helps us with our works of service. He/she may or may not be Catholic. He/she may not attend meetings regularly. An Associate Member cannot vote and cannot be an officer of the Conference. Many Conferences throughout the country have Associate Members. A couple of common examples are 1) a non-Catholic spouse of an Active Member who helps out and 2) someone who wants to help by maintaining the food in the pantry but doesn't want to take part in meetings or other activities of the Conference.

No one should be considered an Active, Associate, or Contributing Member without the Conference as a whole agreeing to it. So, all new members should be formally approved by the Conference. There is no special interview process or checking that has to be done except that they meet the criteria specified in The Rule.

(04/16/2015) Q: At our Conference meeting the other night we got in to a long discussion about keeping records of calls, where there is no visit done, for the Annual Report. Some of the members thought that when people we had previously visited call us back, but do not receive a subsequent visit, and are either assisted without a follow-up visit, or not assisted at all, that these call backs should be counted at "phone visits." I, on the other hand, was under the belief that "phone calls" involved people who call in to our office, but are not assisted at all because they live outside our parish boundaries, or they get a food card from the church office and are not given a home visit from the Society, etc. I did not think we are supposed to count friends we had previously visited when they call back from additional help, or to talk about something else. Please advise.

A: On the Annual Report form, the category is "Telephone-Only Contacts." If the phone call is only for setting up an appointment, then it should not be counted. However, if it is part of a follow-up, a consultation, a call in which you are arranging for assistance to be given, or a referral to another Conference, organization or agency, then it should be counted.

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(04/16/2015) Q: The question that has been raised is: if a President has served 1 partial term (less than 3 years) and 1 complete term of 3 years are they still eligible to run for re-election? I read the Rule, Statute 12, Servant Leadership Positions, pages 54 -55 which states: "once a President has served for two consecutive three-year terms that person will not be eligible for re-election as President until..." This language does not appear to answer the question listed above. Please advise.

A: Effectively, The Rule indicates that the President shall not serve for more than six consecutive years (term ending September 30 of a specific year). In this case, an election for another three-year term would place the person in violation of The Rule. Electing a President for a shorter term is a violation of The Rule. The person you are referring to will have to step down for at least three years before being eligible to serve again as President. The Nationally Approved Bylaws describe the situation of a shorter first term when someone leaves the office of President early.

(04/16/2015) Q: Our Conference has recently received a referral from the parish office to help with the monthly rent. The client tells us they were referred by their landlord who happens to be a Vincentian in our Conference. After doing the home visit it is clear the client is in need and deserving of our care. We tried to consider non rent payment options but none of these ideas seemed feasible after the visit. We will make the rent payment but are left with the unresolved issue of if this is in fact a significant conflict of interest that needs addressing. By the way, the landlord/ Vincentian was not part of the decision making process from the home visit.

A: A conflict of interest disclosure does not mean something is wrong. As long as the Conference is aware of the situation and as long as the Conference is not providing a significant portion of the landlord's income, there should not be a problem. The fact is that people get into financial difficulty regardless of who owns the property. Should they be denied assistance because one of the members owns the property? The conflict of interest policy is designed to disclose relationships – not declare them improper. It is a decision of the Conference as to what to do with the information disclosed. Having the landlord/Vincentian not participate in the decision was a very good way to approach it.

(04/23/2015) Q: Our Conference owns a thrift store. Our thrift store manager is a Catholic, a member of our parish and a paid employee. Our Assistant Manager is a Catholic but not a parish member. Neither were Vincentians when hired. Currently both are voting at our Conference meetings. Is this acceptable to the Society or are there restrictions on voting?

A: According to the nationally approved bylaws for Conferences, voting within a Conference is restricted to Active (Full) Members. Essentially, an Active (Full) Member must be Catholic, attend meetings regularly, and participate in the works of the Society. Paid staff may be Active (Full) Members but cannot be officers. There is nothing in the Rule that specifies that an Active (Full) Member must be a member of the parish. From what you indicated, the only thing that might prevent the Manager and Store Manager from being Active (Full) Members and voting is if they don't attend meetings regularly. Working in the store is a work of the Society. From a conflict of interest standpoint, they may be restricted from voting on store issues, since it may affect their jobs.

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(04/23/2015) Q: I am considering throwing my hat into our upcoming election for our Council president. I have been looking for what type of requirements I need to meet to run. For instance being a Conference president or how long I need to be a Vincentian to be eligible to run; or if there are any other eligibility requirements?

A: The only requirement to run for presidency at all levels of the Society is to be an active full member. There is no timeframe on how long one must be a member of the Society to run for presidency. Leadership positions in the Society, at any level, are always to be accepted as service to Christ, the members, and the poor. Election of presidents is held by secret ballot in accordance with an approved set of procedures (by the local Council) that are consistent with the Rule and Statutes of the Society. No other eligibility requirements are needed to run for presidency.

(04/23/2015) Q: Do the officers of the District Council have voting privileges? All the officers were put in place by the president, without the input of the conference presidents. Shortly after this assignment, the treasurer quit, and has yet to be replaced. Our Council President was up for re-election last year, and ran un-opposed. Obviously he was re-elected, and he kept the current officers. Presently at the district council level, only the secretary is a Conference president, vice-president is not a Conference president, and our president is not a Conference president.

A: Based on the bylaws, there are two conditions:

1. If there is no formal Board of Directors, only the President of the District Council and the Conference Presidents are voting members. Officers could only vote if they are also Conference Presidents.
2. If there is a formal Board of Directors, the appointed officers could be voting members as long as the total appointed Board Members does not exceed the number of Conference Presidents.

(04/30/2015) Q: Agencies participating in a particular coalition are requested to submit their logos to be included on the documents. I have not sent the SVdP logo because (1) we haven't been provided anything that describes what we are committing to if we are members and (2) I don't know who needs to approve the use of the logo. I anticipate the issue regarding what membership entails will get resolved in the next few months. At that point we'll decide if we want to be members. Do you have any guidance regarding use of the SVdP logo on other than SVdP documents?

A: You need to be very careful as to who you allow to use our logo. The biggest concern comes from what the organization presents publicly. We want to be sure that our logo is not associated with anything that would be contrary to our Rule or the teachings of the Catholic Church.

(04/30/2015) Q: One of our members was invited to participate in a Walk to raise awareness about violence against women. She would like our Conference members to walk, wearing SVdP t-shirts. My

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thought is that SVdP cannot lend support to other concerns, no matter how valid they might be. But could you give me an official opinion?

A: There are times when SVdP has a formal collaborative relationship or partnership with other organizations. There are also times when the Society, through the Voice of the Poor, formally indicates that support should be given in favor of or against particular issues. In those cases, the type of support you describe may be appropriate. If this is not the case, the members should not wear their SVdP t-shirts or in any way identify themselves as SVdP. They may at any time support any organization or cause they feel moved to, but not officially as SVdP – just as individuals.

(04/30/2015) Q: We have a client in one of the conferences that is being looked for by the police. I don't know if the conference knows where she is, but they do know the location of a storage facility that is owned by the person. Question: Can the conference disclose this information, either voluntarily or by a summons? I think not, but I wasn't sure. Please advise.

A: This is different from a seal of confession. We do not voluntarily share information with other agencies. However, if there is a legal summons made requesting information, we comply. To voluntarily provide information to the police is a matter of conscience. It would really depend on the seriousness of the matter. You have to discern what withholding the information could mean in the long run. Is it likely that people will be hurt (physically, emotionally, or economically) by withholding the information? Decisions like this require a lot of prayer.

(05/07/2015) Q: Can you tell me or point me in the direction of where I can find the information? What are the responsibilities of the recording secretary of the council? I don't see a lot of detail in the manual. I have been told that the secretary has to sign reports and authorize signers on the bank account, is this true?

A: The following is an excerpt from District Council Bylaws which describe the function of a Council Secretary: *Role and responsibilities of Secretary(ies): The Secretary shall attend meetings of the Council, Board and Executive Committee and ensure that all votes are recorded and minutes kept of all proceedings. The Secretary shall give or cause to be given notice of all meetings of the Council, Board and Executive Committee and shall perform such other duties as may be prescribed by the President, Council, Board or Executive Committee. The Secretary shall see that the seal of the corporation is kept in safe custody and that same is affixed to any instrument requiring it, and when so affixed, it shall be attested to by the Secretary's signature or by the signature of the Treasurer. The Secretary is responsible for ensuring that records are kept of Aggregations and Institution, formal documents, meeting attendance and that the annual reports are collated.* To address your question directly, secretaries should sign on reports that they either prepare or contribute to the preparation. The Secretary does not authorize signers on an account. The Secretary provides a letter reflecting the minutes in which signers on the account have been authorized by the Council.

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(05/07/2015) Q: Our local electricity utility demands a deposit of \$300 for two years of a new resident in our town at one of our rental apartments. Because of the legal concerns, after two years, that deposit is sent back to the resident if they pay their bills during the two years (even if SVDP pays that initially). It is my contention that this is a deposit that should be returned to us as an SVDP conference (unlike rents that we pay to a third party that never gets rebated). Some in our conference feel that we should not ask for a return of these monies. What is the position of National?

A: Two things to keep in mind: first, the utility company may not keep track of a third party to whom the refund should be given. Second, when we give assistance to people, it is given as a gift – not a loan; so we should not look for a return. One of the things we have always promoted within the Society is that “once given, the gift belongs to the recipient.” They can do with it as they please. That goes for food, clothing, furniture, rent, utilities, gift cards, vouchers, etc.

(05/07/2015) Q: I have heard from other Conferences in our Council that they get all of their money directly from the Parish, in that, the Parish Office sends the Conference a weekly check because they are a Stewardship Parish. Parishioners do not write checks payable to SVdP, the Parish determines how much they budget to SVdP and send the conference a check. I thought we were not to commingle our funds with the Parish, as stated on Page 26 of the Manual. In my Conference, all of our donations are either in SVdP envelopes or checks payable to SVdP and the only thing the Parish Office does is collect them and then deliver them to us on Monday morning. How does SVdP handle the finances when their Parish is a Stewardship Parish?

A: Those are not commingled funds. There are many Conferences in the country who get their financial support that way from the parish. The way you describe it, the funds are allocated from the parish to SVdP, then a check is written and the funds given to the Conference. This implies the Conference has its own account, managed solely by the Conference. Commingled funds exist when SVdP funds are in an account managed by the parish. In this case, the Conference would request checks to be printed through the parish office. Also, funds are considered commingled when a priest or deacon is a signor on the account. This is not allowed. Stewardship Parishes do not have second collections and typically will allocate funds to the various ministries in the parish.

(05/14/2015) Q: When we started our Conference about 5 years ago, we ordered a series of brochures from the National Council office to distribute to acquaint folks with SVdP and to also recruit. One of the tri-fold brochures is blue but with no other ID number. (I can mail it to you if you like) Inside it lists What We Do. On the list it shows 27 items including Free Legal Assistance, Free Pharmacies and Free Dining Rooms. I recently asked our Council President how we get free legal assistance (for a client) and he said we do not do such a thing. What was meant by "Free" and do we provide "Free" Legal assistance?

A: The brochure lists a composite of services that are offered throughout the country. It is not meant to imply that all the services are offered everywhere. The answer to “free” legal assistance is only if you

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have attorneys who are willing to do some pro-bono work. This is something you would have to search out for your area.

(05/14/2015) Q: My next question is again about councils with/without an integrated board of directors. Do not the vast majority of councils fall under the category of “without an integrated board of directors”? I know that our council, when founded, fell under this category. Now the president wants us to approve switching to a council with an integrated board of directors. I am concerned that this would lead to assignment of positions with voting privileges. Is this a legitimate concern? We are expected to vote on this at an executive meeting coming up, so it is important that we clearly understand what we are getting into.

A:

- A. Technically, most District Councils operate with no Board of Directors, its simply the District Council President and all of the Conference Presidents (these are the only voting members).
- B. Those District Councils that have a Board of Directors are usually Integrated. This consists of District Council President, all of the Conference Presidents and appointed members (not to exceed the number of Conference Presidents). All the members I indicated here are voting.
- C. There are some (rare) District Councils that operate with a Separate Board. This consists of the District Council President and x number of Board members appointed by the President after consultation with the Conferences. This can occur when a District Council has an unmanageable number of Conferences (maybe 40 or more). Only the District Council President and the appointed members are voting members of the Board.

Please understand that there are technically two structures in B and C. There is the District Council and the Board of Directors. The District Council (described in A) can override any decision made by the Board of Directors since the District Council gives authority to the Board.

(05/14/2015) Q: When the question of earning interest came-up at several of our conference meetings over the past years, the president's reply was that we were not permitted to earn interest because of our non-profit status. Please let me know whether or not a conference can legally earn interest.

A: We are allowed to earn interest on our funds. Many of our Conferences have their checking accounts in Credit Unions and Savings and Loans instead of banks. Both pay interest on checking accounts. This is not a situation related to hoarding or endowments. Hoarding only comes into play if you choose to keep money in the bank to earn interest instead of helping people.

(05/21/2015) Q: I am researching what my Conference might need in the way of insurance. Do we need property insurance and liability insurance? The church owns our building. On the SVDP national website is the information about Group Insurance Plan for \$200 which is liability insurance for Conferences that do typical Conference works. At the bottom of the page it mentions “Who would not

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qualify” and where it says “Buildings or land is leased” I want to know the difference between “rent” and “lease”. The church is thinking of charging us rent for using the 2-room classroom building that is separate from the main school buildings. If the parish wants us to pay rent, does that disqualify us from getting liability insurance?

A: If your Conference is not covered by the Council’s insurance, then you should get coverage through the National Group or elsewhere. As far as eligibility for the National Group, the Group does not provide coverage for property. If the parish has coverage for the property you are leasing/renting (essentially the same for our purpose), then you can join the Group. If the parish does not provide property coverage for its facility and expects you to get it, then you will not be able to get coverage from the National Group and will have to seek coverage elsewhere.

(05/21/2015) Q: Are employees of St. Vincent Thrift Stores allowed to be voting members at the local conference?

A: Thrift store employees are not allowed to vote at Conference meetings unless the store employee is also a full Conference member. The Nationally Approved Bylaws for Conferences says that each Active Member of a Conference has one vote and that vote must be cast in person. Non-Catholics may not be Active Members; they can be Associate Members and, therefore, cannot vote.

Employees of the Society, of its Special Works or of organizations controlled by the Society, may serve in a Conference with membership rights and privileges other than that of holding any office within the Society.

(02/21/2015) Q: We have a large number of undocumented immigrants in our area and two questions have come up which we expect to be major concerns in the near future:

- 1) Does the Society have any policy guidelines with respect to giving financial support to an immigrant who is eligible to apply for a "green" card but needs financial help to do so? We have such a request right now and the amount needed is \$465.**
- 2) Does the Society have any policy guidelines with respect to giving financial support to an immigrant who has decided to return to his/her native country but needs assistance in paying for the travel?**

A: There are no official policy guidelines set by the Society for providing assistance to immigrants. What we are looking at is helping people who need help and providing compassionate aid to the needy regardless of their circumstances politically or otherwise. **Part 1:1.3** of the Rule states, *“No work of charity is foreign to the Society. It includes any form of help that alleviates suffering or deprivation and promotes human dignity and personal integrity in all their dimensions.”* There is no reason why we cannot help do something that is legal. **Part 1:1.4** says *“the Society serves those in need regardless of creed, ethnic or social background, health, gender, or political opinion.”*

In addition, there is no reason a Conference cannot provide travel assistance to someone returning to their homeland. There are no Vincentian rules preventing this type of assistance; it is at the Conference members’ discretion whether or not they want to help. Every Conference has assistance guidelines. If

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none exist in any particular assistance request situation, one can be established for future requests for assistance of the same or similar types.

(05/28/2015) Q: Our parish is being closed and we have an active Conference. What can we do?

A: There are a few possibilities open to you.

- 1) Have all members join a neighboring Conference turning over your assets to them.
- 2) Continue to operate as a Conference but outside of the parish itself. Find a location to meet regularly and work out the logistics.
- 3) Disband the Conference, turning over all assets to the next higher Council.

(05/28/2015) Q: What is the SVdP USA guideline w.r.t. the number of scheduled SVdP meetings a member must attend to qualify as an ACTIVE Member?

A: To qualify as the status of an Active Member one must attend 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.

The term "Active Member" does not refer to busy-ness or activity. Actually the term is "Active (Full) Member." An Active (Full) Member is one who (in summary)

4. Is Catholic
5. Attends meetings regularly
6. Participates in the activities, works and life of the Conference.

All three are important to be an Active Member. If #1 or #2 is missing, they are Associate Members.

The objectives of the Society are growth in holiness, community, and service. The Conference meeting is one of the only times when all three come into play. That is why the meeting is so important.

(05/28/2015) Q: In one of the answers to questions in the last printing of Frederic's Gazette, I saw the answer that the treasurer should write the checks. I was treasurer for a while in our conference and was not allowed to write the checks. We continue to use this policy. I am not sure, but this might be a policy of the bank we use. There seems to be a possible temptation on the part of the treasurer to misuse the funds if he/she is allowed to write checks. I am curious about the recommendation to have only the treasurer write the checks in this light.

A: The typical Conference will leave the check signing to the Treasurer who generally controls the bank account. Some Conferences encourage two signatures on checks; this is primarily a procedural requirement and is a good practice but not a requirement of the Society. The bank does not define who the signors are on the account. Only qualified and dedicated members should be chosen for the various Council and Conference leadership positions. Conference presidents should only appoint officers after

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consultation with the members. All members, particularly leader should possess a high level of integrity and honor.

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.

(06/04/2015) Q: Please confirm that stores are no longer required to submit separate dues.

A: As of October 1, 2013, stores no longer are to submit \$75.00 for the National Stores Committee. The new solidarity formula covers what used to be separate national, regional, international and stores solidarity contributions. However, when a Council or Isolated Conference pays their solidarity, the Council or Isolated Conference may legitimately look to their store to cover its portion of that solidarity contribution.

(06/04/2015) Q: Some of our Conference Parish Pastors require finger printing and back ground checks on all their Ministry volunteers this includes SVdP; while others do not have that requirement. The following is a question regarding this issue. " Are all conferences required to follow their Parish requirements having their members finger printed etc. The rational from the pastors is to insure the safety of the most vulnerable the youth of the Parish and the elderly. What is the SVdP National Policy on this issue. "

A: 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 or parish, then you are obligated to comply.

(06/11/2015) Q: Can you check to see if there is anything in the Rule that prohibits or discourages endowments designated to support the operating budget for Councils and Conferences?

A: There is nothing in The Rule or Bylaws that prohibits an endowment. Typically, we advise Councils and Conferences that, if they want to establish an endowment, they should do fund raising specifically for that purpose. People should know their donation is going into an endowment. Use of general funds of Councils or Conferences to establish or grow an endowment is questionable since people generally donate to help those in need, not build a bank account.

(06/11/2015) Q: As District Council President, I drive to the District Council office at least 3 times per week. Is it appropriate for me to be reimbursed for mileage? The District Council paid staff receives .55 per mile for District Council business.

A: 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 expense incurred.

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(06/11/2015) Q: I was told recently that we are expected to give a tax receipt for in-kind merchandise that is donated to our Conference. We have never done this. Is this necessary?

A: Many people who donate clothing or small miscellaneous items to a SVdP Conference are not expecting to receive a tax receipt. However, whether it is clothing, household items, furniture, beds, or anything else, if the donor requests a receipt, you must honor the request. The receipt should acknowledge receiving the merchandise but not attach a value to it. Defining the value of the merchandise is not the responsibility of SVdP. That is between the donor and IRS. It is not necessary to list every item. 3 "bags of clothing" or 2 "boxes of household items" is sufficient identification.

(06/11/2015) Q: Is it permissible for a non-Catholic, who is not a member, but is the secretary of a member, maintain and answer the phone. The member works out of the office, the secretary stays in the office.

A: A non-Catholic, who is not a member, but is the secretary of a member can maintain and answer phone calls to take messages only and not make decisions for the Conference. The objectives of the Society are growth in holiness, community, and service. The works that we do helps us to achieve that growth. In addition, the Society welcomes others participation in charitable works such as phone call message taking.

(06/25/2015) Q: I'd like to ask you what is the Society's take on handling the families that have been coming to us for aid over a very long period of time. We have been helping some for 8-10 years or more. What is the best way to assess their situation for the need of continuing aid to them?

A: Your question is not an easy one to deal with. But it is a fairly common problem among our Vincentians. To simply cut someone off after a period of time is not the answer. To establish a Conference guideline that limits help to once a year (or some such) is not the answer. I have seen Conferences who have a limit of financial help once in a lifetime. That is one of the worst answers. The fact is that we must ask two questions. One, is anything happening in the family that is improving their situation? And the other, what are we doing to help them improve their situation? There are rare situations where a person or family is in such a mode of life that it is not likely that things will improve for many years to come; for these, we must be their friend as long as it takes. For the others, the keyword is "friend." We must be their friends. We must do more than just pay a bill or provide food or clothing. We must walk with them and guide them. We must help them through the process. You ask, "What is the best way to assess their situation for the need of continuing aid to them?" Only a friend can learn the best way. It takes time to get to know people. It's more than simply giving - it's knowing and loving. Our Lord asks us to love those in need in the best way possible. This is part of systemic change that we Vincentians must experience.

(06/25/2015) Q: Can you please tell me if National requires Quarterly Reports? I am using QuickBooks on an Accrual Basis with a CPA Firm for our bookkeeping which is in conformance with General Accounting Procedures. These reports are very flexible, ie: I can do a, a quarterly report, an annual report or a meeting to meeting report. As you may know, the National Annual report is not flexible. It is based on a Cash Basis and they do not want you to add any items but they want you to fit all your

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figures into the form. Doing this once a year for the annual report is very time consuming but doable. My Vice President wants me to do it Quarterly. This is very time consuming and does not make the annual report any easier. My Diocesan Council President suggested doing it Monthly. This is even more time consuming and does not make the annual report any easier. Can you give me some guidance as to how to approach this problem?

A: The National Council does not require quarterly report filings. Quarterly reports are completed by Conferences &/or District Councils at the request of their respective upper Councils. The National Council only requires annual reporting. Typically, answers to 4th qtr upper Council reports from Conferences &/or District Councils are the same information as needed on National Council annual reports. Thus, generally information contained in 4th qtr reporting to Councils should also serve as the same information needed for completing the National Council annual report requirement.

(07/02/2015) Q: My Executive Director is under the impression that the maximum amount a conference will pay in a solidarity contribution is \$1000 with the minimum being \$150. In reading the National President's letter I see the maximum being \$50,000 and minimum \$150. Can you please clarify?

A: The solidarity formula is applied to total income for a Council or for an Isolated Conference. In your case, it is applied to the Diocesan Council. The maximum solidarity contribution is set at \$50,000 (adjusted annually for inflation). The minimum is set at \$150.00 (adjusted annually for inflation) times the number of Conferences in the Council. It is up to each Council to determine what each entity in their Diocesan Council (Diocesan Council, District Councils, Conferences, stores, special works) should pay toward that total solidarity contribution.

(07/02/2015) Q: Can conference funds be used for the training and education of Vincentians? This could include national meetings, poverty workshops, systemic change, and leadership training? Is this sourced to The Rule?

A: Yes, Conference funds can indeed be used for training and educating Vincentians, which could include national meetings, poverty & systemic change workshops, leadership training, etc. All funds can be used for the purpose of the Society. As the Rule Part III, Statute 26 states, "the funds of the society shall be used for the works of the Society..." Thus, Vincentians properly trained will help members to better serve those in need. Also refer to the Manual, page 26 "Funds of the Conference."

(07/09/2015) Q: I found your answer to the question of how long to keep records appropriate; however, you didn't go far enough. Our Conference is about to celebrate its 50th Anniversary. We found out that we have not kept much in the way of historical records of our Conference. We have now spent a great deal of time searching and haven't found much. Please advise other Vincentians to keep historical records so they can be prepared for special anniversaries. Thanks for your comments.

A: When I addressed the question about how long to keep records, I indicated that page 32 in the Manual has a complete retention breakdown. On page 32, it indicates to keep items with historical significance permanently. I can relate to your situation because I experienced the same thing with my

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Council's 50th anniversary when I was in California a number of years ago. Let's not lose track of our history.

(07/09/2015) Q: We are computerizing our client records. Interview info will be placed on computer. Is it necessary to obtain clients signature and keep on file as permission to contact agencies to verify info?

A: In order to discuss client information with anyone outside SVdP (other agencies) you must have permission to do so from the client. Many SVdP Councils/Conferences have case record forms that have a disclaimer on it; others have a separate release of information form for clients to sign.

Feel free to look under 'Best Practices for Conferences' to view a sample disclaimer statement. Here is the link: <http://www.svdpusa.org/members/Membership/Best-Practices/Conference-Concerns>

07/16/2015) Q: I don't know that I can put this in the form of a question. I understand the need to maintain records, and I don't think there is anyone in our Council who supports systemic change more than I do. But, we have lost 3 conferences due to paperwork and the extra time and effort required for systemic change. At least two of the three still have charitable programs, they just aren't SSVdP. They feel they can still do the charitable work they were doing as a SSVdP conference without all the paperwork and meetings, and they "have always done things this way." I don't want to overemphasize this, but a contributing factor is the thought that this is how SSVdP works and if you are going to be an SSVdP conference this is how you need to do it. Are we better off just letting this take its course and having less conferences, or is there something different we need to do, or a better explanation we need to give?

A: There is no simple answer to your question. And, I believe, it is more than just paperwork and systemic change. Systemic change is relatively new and there hasn't been a significant impact on what we do in the Society yet, so that really can't be the reason; unless people are reacting to something they know nothing about. Paperwork has been part of the Society since it was formed. Frederic Ozanam was asking Conferences to keep records and report activities from the beginning. If the Conferences were formed properly, emphasis on paperwork was an important aspect of training. It is essential to being a good steward of the resources given for our use. I have found that proper training is essential to the success of any endeavor. Vincentian work is not different. Our members need to be well trained and then regularly nurtured. When someone joins the Society, they agree to follow the rules and procedures of the Society. If they choose not to, then they should find a ministry that better suits them. You ask, "Are we better off... having fewer Conferences?" If we have done everything possible to keep them in the fold, the answer to your question is "yes."

(07/16/2015) Q: I am the Chair of the Spirituality Committee and a member of Conference and Concerns Committee and I have a question about family members being officers of a conference/district. We have a rule against the signers on the Check Book being in the same family; but what about any officers being in the same family?

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A: 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. Thus, the Rule specifies that it is inappropriate for the president to appoint family members.

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.

(07/16/2015) Q: I’m in the process of completing a 1023 for the Diocesan Council; if I understand correctly, I could avoid the long delay of approximately 16 months backlog with the IRS and apply for inclusion under the National Group...is that correct?

A: Joining the National Group Tax-Exemption is a much faster and less costly because there is no fee. The only thing that would prevent your Diocesan Council from joining the National Group is if it had tax-status that was revoked by IRS. If that is the case, you have no choice but to go the form 1023 route.

(07/23/2015) Q: A conference closed because of lack of physical & I think Parish resources. They closed their bank account & sent about \$12k to our council. What to do with the \$\$ we thought about giving it to the same parish that it came from to help the poor or use it to help start new conferences or to deliver workshops using outside resources to strengthen current conferences. We noticed on Nat’l financial statements escrow \$\$ & Mike said each of those were from closed Councils (I think). So how long should or would u or we escrow this \$12k & if we thought the Conference would not restart in a reasonable amount of time would that change the handling of the \$\$?

A: If there is any chance that the Conference will re-open in the future, you should keep the money in escrow for them at your District Council. If it is not likely to re-open in future, you should keep the money for a year or so and then use it to serve the poor in the Council, probably through assistance to conferences.

(07/30/2015) Q: What are the options for council/conferences that have had their tax-exempt status revoked?

A: A District Council or Conference that has its tax-exempt status revoked has two options. First, it may be reinstated by applying to IRS as soon as possible with form 1023 (or the newly created form 1023-EZ) and paying the \$850.00 filing fee (the new 1023-EZ may require a lower filing fee). The full form 1023 will take about 16 months due to current backlog to be processed. The other option is, if the Diocesan Council will allow it, for the District Council or Conference to discontinue use of their EIN and begin using the Diocesan Council’s EIN. This puts the Diocesan Council in a “doing business as” relationship with the District Council or Conference. The Conference no longer needs to fill out a 990. The Diocesan Council will take the annual numbers from the Conference and include them with their annual 990 filing to IRS. This is a good option for District Councils and Conferences as long as the Diocesan Council accepts the responsibility and the additional workload.

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(07/30/2015) Q: Without a classification of Contributing Members how would one differentiate them into the report? Contributing Members was interpreted as a Parishioner who continuously donated to the SVDP Conference but did not attend meetings. (This is not all Parishioners) There is now, no classification of contributing members in the now instructions for completing the Quarterly or Annual Report. The explanation for Contributing Members I believed was valid and did not include all parishioners in the Parish, because all parishioners do not contribute to a SVDP Conference (although they should). There is confusion now if you would look at the break out in the instructions. Total Vincentians are Active and Associate, understood. But, the double booking in the Report information makes it unclear to some reporting Conferences, i.e. a space for Total Members (Active & Associate) and below on the form Total Vincentians (also Active and Associate Members)? Why double entry, which makes it confusing and some preparers include numbers outside of Active and Associate. I hope you understand my explanation. I find that some Conferences are unclear due to unclear explanations.

A: The National Council does not require quarterly report filings. These reports are completed by Conferences at the request of their respective Councils. The National Council only requires annual reporting, and as explained previously, we are no longer collecting information on contributing members for National Council annual reports. Since quarterly reports required by Councils are not viewed by the National Council, there is no double reporting taking place; but rather local Council reports and National Council reports both sharing similar reporting requirements. Typically, answers to 4th qtr Council reports from Conferences are the same as needed on National Council annual reports.

(08/06/2015) Q: What are the advantages/disadvantages to filing for individual 501 c 3 status separate from the National Group?

A: The only real advantage to applying for tax-exempt status through IRS rather than join the National Tax-Exempt Group is that you get a specific letter of determination from IRS identifying tax-exempt status. When you join the National Group, you get the letter from us but not one from IRS. IRS still considers you a non-profit in our Group but they do not send a letter of determination.

(08/06/2015) Q: Can you give me a list of days of the calendar year for celebrating Frederick Ozanam, Rosalie Rendu, St. Vincent de Paul?

A: For feast days, pls refer to page 10 of the Manual which states: According to the original Rule and the Society's tradition, Vincentians celebrate "Festival Meetings," gathering together for Mass and a meeting. Today the Society meets on one or more of the following: the Feast of Blessed Rosalie Rendu (Feb 7th), Ozanam Sunday (the last Sunday of April), in honor of the April 23rd birthday of Frédéric Ozanam), the Feast of Blessed Frédéric Ozanam (Sept 9th), the Feast of St. Vincent de Paul (Sept 27th), the Feast of the Immaculate Conception (Dec 8th), the Feast of Our Lady of Guadalupe (Dec 12th). See also Rule: Part III, Statute 9.

(08/13/2015) Q: Should I obtain separate EIN numbers for each District or should I apply to be included with National?

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A: Like the Conferences, the District Councils may be included and use the Diocesan Council's EIN. However, if the Diocesan Council will not approve this, then each District Council will need its own EIN, will have to file with IRS (form 1023) or join the National Group, and file an annual 990.

(08/13/2015) Q: Can you clarify exactly what a quorum is?

A: A quorum is a majority of eligible voting members. The count is 50% of the total body plus one must be present for a quorum to exist. So with 35 Conference presidents in the district, there must be at least 17 plus one more present at a meeting that all Conference presidents are aware of for any business to take place.

(08/20/2015) Q: I understand that Aggregation Certificates are issued via the application process after a conference has been in existence for 12 months. I know the certificate is formal and official recognition by the Council General International (CGI) that the conference is an official conference of the SVDP international organization. Is there more you can add to the significance of the certificate? I have a conference that is scheduled to receive the certificate after the CGI meets this month and they are asking "what does this mean" so am asking for your input as well.

A: The significance of Aggregation for Conferences and Institution for Councils is primarily the recognition by CGI that a Conference is officially recognized as part of the Society of St. Vincent de Paul. The other significance is that currently aggregation/institution is required for participation in national voting and there are some national programs that only allow participation if the Conference is aggregated or the Council instituted: examples are International Twinning, Friends of the Poor Grants, National Group Insurance and others. In the near future, this will most likely be expanded to all national programs with the recommendation that this be implemented for local Council sponsored programs as well.

(08/27/2015) Q: I have just been informed by one Conference president that she will be present at the upcoming meeting and therefore has given me the name of the candidate her Conference would like to see as Council President. How can this be handled? Can this be a write in vote? Can she send a proxy? Or does this Conference lose its vote because the president will not be at the election?

A: The process for election of a President is very important. The actual process is best outlined in a document that can be found on our website 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 District.

Article 12 of District Council bylaws outlines the election process and requires a secret vote. The nominating Committee controls the election and ballots have to be distributed. The vote for President is

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not taken at a meeting, only the results are reported by the nominating committee, i.e. who is the newly elected President. There is no provision for proxies or anyone other than Conference Presidents to vote.

(08/27/2015) Q: It has come up in our conference several times and this is the question: Where does it state in the SVDP rules the requirements for background checks and fingerprinting for volunteers. We often get some resistance and in the interest of explaining it clearly, we have yet to find a reference to SVDP volunteers. There are quite clear instructions for teachers and those involved with children directly but nothing specific to us. Can you put some light on this?

A: You will not find it in The Rule or bylaws. However, it is a firm policy of the Society that, regarding Safe Environment policies, the Society members are to comply with the requirements of their Bishop and Diocese. In April of 2011, the National Council approved Resolution 91 which states:

Resolved That, it is the obligation of all Vincentians to comply with the requirements of the program to protect children in their (Arch) Diocese and it is the responsibility of (Arch) Diocesan Council Presidents, District Council Presidents and Conference Presidents to ensure that compliance.

(09/03/2015) Q: Is there a guideline that Conferences should try to maintain a reserve equal to three month's average expenditures?

A: 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. 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.



(09/10/2015) Q: I realize that you are probably not the person who selected the picture of Jesus Christ that has been appearing in the e-Gazette but I pray that someone replaces that tacky 'laughing Jesus' with art work more respectful of Christ. I can't be the only person who finds such a representation repulsive. There are many fine Icons of Christ or Symbols of Christ that can be downloaded free of charge. Each person pictures Jesus in their own way, hopefully an image of a mature Christ. Check with a professional artist.

A: This picture has been used in association with the Invitation for Renewal for more than ten years. Our Lord has many faces. I believe that Jesus is truly human and truly divine. To be truly human, He had to have smiled and laughed at times. Maturity is not defined by a somber look. The smiling Christ is a very respectful depiction of Him. Also, smiles and laughing normally depict joy. I am hoping to spend all of eternity with our Lord, so I am anticipating a lot of joy.

(09/10/2015) Q: A local conference president was working with a friend in need, and developed, what we feared was more than just a casual relationship with him. Where is the SVdP documentation

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on "conflict of interest." Do you know what language we have in the bylaws or Rule that specifically addresses this?

A: According to District Council Bylaws for both Districts with a separate board and Districts with an integrated board, Conflict of Interest policies are intended for both, paid and volunteer staff. Refer to the following District Council bylaw references on Conflict of Interest guidelines:

- District Councils with separate boards – see pg 34
- District Councils with integrated boards – see pg 33

In both examples, District Councils are encouraged to establish and enforce Conflict of Interest policies to protect the organization's interest.

(09/17/2015) Q: What is the definition of "hoarding?"

A: Hoarding is maintaining a large balance of funds (or their equivalent) in a financial institution and choosing to not use those funds on behalf of those in need. The size of the fund is irrelevant to the definition, but size affects the degree of wrongdoing. The intent for the use of funds donated to the Society is to assist those in need. So, if a SVdP entity has a large balance, they are expected to purposefully spend down that balance to zero in a reasonable amount of time, using those funds on behalf of those in need. It would be wrong for a SVdP entity to maintain an account and refuse to help an individual or family when they have the funds to do so. Our purpose is to help people in need, not build up bank balances.

(09/17/2015) Q: A neighboring Diocese has started advertising in our local newspaper and has placed thrift store coupons in the ad. Customers come in and we tell them that is not our store and they get angry. My understanding is that we all stay within our own Counties. We certainly do not want to alienate customers or start a price war with other SVDP stores. Pls advise.

A: Resolution 104 pertains to Councils and Conferences soliciting funds inside the boundary of another Council or Conference. What this resolution advises is that no Council or Conference is to conduct fundraising (including thrift store creation) in another diocese boundary without their explicit agreement.

(09/24/2015) Q: Our Conference has been given collections and the poor box funds for many years. Our treasurer has a key for the poor box and empties it on a regular basis. Our pastor told us that, by order from the diocese, the parish must count the funds in collections and the poor box before giving the funds to SVdP. We feel like there is a lack of trust and are not sure what to make of this change.

A: This is a common practice in many parts of the country. The parish is held responsible for all collections of funds. The parish provides the counters, records the collections, and then turns the funds over to the Society. This is a process that works well. As long as there is a good working relationship between the Pastor/parish and the Conference, there should be no concern in this matter.

(09/24/2015) Q: I am seeing presidents elected without a quorum. So many do not attend the meetings; maybe a paper ballot will suffice? When we elect a Council president, we have an email from every Conference.

A: No election should occur without a quorum or without the presence of members! A quorum for a Conference meeting consists of a majority of Active Members in a Conference. For example, if your

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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.

The nomination 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. Voting is only valid when a quorum of members is present. Although meetings are only valid when ALL members are invited to attend, a quorum is a majority of eligible voting members. So if your Conference has 20 Active (Full) Members, there must be at least 11 present at a meeting that all members are aware of for any business to take place.

(10/01/2015) Q: A member of my Conference said he spoke to you and you said our Regional Vice President does not have a vote at the National level. Can you verify this?

A: According to National Council Bylaws, each of the eight Regional Vice Presidents is a voting member of the National Board of Directors. However, the Regional Vice Presidents do not have a vote on the National Council. The voting members of the National Council are the National President and the duly elected National Council Members (each representing a Catholic Diocese where the Society is present).

(10/01/2015) Q: We want to be contributing members. Is there some membership form or anything?

A: Contributing Member status is available at the parish Conference level. No one should be considered a Contributing Member without the Conference as a whole agreeing to it. So, all new members should be formally approved by the Conference. There is no special interview process or checking that has to be done except that they meet the criteria specified in The Rule. 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.

(10/08/2015) Q: We have a Conference that has been devoted solely to a food pantry for many years. We have tried to get them into the home visit mode without much success. We have been thinking about some ways that perhaps we can somehow introduce some spirituality into their contacts at the food pantry. We would like for the members to experience some of the spiritual growth that occurs so much in our home visits. I was wondering if you have any ideas of things a pantry Conference can do to enhance their personal spiritual growth as they interact with their clients in the pantry situation.

A: Three things could help:

1. Before they open the pantry, the members should pray together using the Conference meeting opening prayer. Also when the pantry closes, they should say the closing prayer.
2. When interviewing people, they should say a prayer with them.
3. Also, they can distribute holy cards, rosaries or other sacramentals with the groceries.

(10/08/2015) Q: Statute 12 says that “...appointees should not be relatives of the person empowered to make the appointments.” Does the “should” in the statute mean that this is more of a guideline than a requirement? The statute gives good reasons for this management issue—nepotism can be at the root of difficult situations in a Conference.

A: The last sentence of Statute 12 of Part III of the Rule states: “To safeguard the good reputation

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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. Thus, the words “should not” in this statute are interpreted as a requirement and therefore presidential appointment of relatives should not be made.

(10/15/2015) Q: A team of Conference presidents and other Vincentians in my District Council are working on an initiative to address homelessness in the geographic area we serve. We are exploring various approaches including a “housing first” model, the establishment of a shelter, support services and so forth. We intend to develop a proposal to present to the Diocesan Council for consideration.

Related to SVdP governance, I am seeking some guidance about what we may or may not do. Specifically, in our situation, may a Conference or District Council enter into rental/lease agreements and/or own property; or hire paid staff to administer a homelessness program?

A: Both of the questions you pose are true governance questions. However, they are local governance questions. From a general standpoint, the answer to both questions is “yes.” However, you are under the governance structure of the Diocesan Council. Such decisions must be made by the Diocesan Council.

(10/15/2015) Q: I am doing a project about how students should participate in community service for my senior college Social Work class. The questions I have are: What is the eligibility criterion for the services provided by the organization? What roles do social workers have in this organization?

A: There are no eligibility criteria. We assist all in need regardless of age, race, religion or creed. There is no formal role of a social worker. The Society does not use “social workers” per say. Our members (referred to as “interviewers”) generally make assessments of our client needs.

(10/22/2015) Q: Our store has been up and running successfully for a while. We now are getting a large number of “walk-in” clients, as anticipated. We have hired one of our current Vincentians, who is experienced with the home visit process, as an “intake coordinator.” We will continue to use the home visit process, but will have the coordinator do intake documentation, refer to other sources of help, coordinate volunteers for home visits, and handle immediate service for basic human needs emergencies.

We would greatly appreciate any documentation on position descriptions, words of wisdom, or other guidelines to get started with this process.

A: Here are some considerations:

1. You are hiring a Vincentian to be the intake coordinator. This means that that person will not be eligible for a role as an officer of the Conference. Paid staff are not allowed to be officers. This person can still be a member, but not an officer.
2. The role of paid staff is to assist Vincentians in the work they do – not do their works of charity for them.

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3. The interview and decisions for assistance are supposed to be done by two Vincentians. Will someone be working with the intake coordinator during interviews and in deciding what basic assistance is to be given?
4. I don't have any documentation describing that role.

(10/22/2015) Q: We have two new Conferences who have applied for membership to the national Society. One I think is about a year old and the other younger. We are curious as to when they might receive an acceptance letter from the National Society.

A: Acceptance letters are generally not sent to new Conferences. Once a new Conference application has been received and the Conference is added to the National Council Membership Database, an email notice is sent to the Council president, regional vice-president and Conference president advising that the Conference has been added to the membership database accordingly.

(10/29/2015) Q: In continuation to last week's Q&A on when a new Conference might receive an acceptance letter from the National Council?

A: As stated, acceptance letters generally are not sent to new Conference, however after one year of formation Conferences are eligible to apply for aggregation. A Letter of Aggregation certificate is issued by the International Council General (CGI) in Paris, and recognizes Conferences as official SVdP entities of our founders. Aggregation Certificates are registered with the international SVdP office and issued to Conferences throughout the world. Councils are eligible to apply for Letters of Institution certificate immediately and do not require a one-year waiting period. Contact Julie Swanger at the national office for more information jswanger@svdpusa.org.

Pls refer to the Manual page 27 and throughout the Rule (Sec 1.3.8; Sec 2.6 & Sec 3 Statute 6) for an official definition & explanation of the process of aggregation for Conferences and institution certification for (Arch)Diocesan and District Councils.

(10/29/2015) Q: Are employees of St. Vincent Thrift Stores allowed to be voting members at the local Conference? What if the Thrift Store is operated by the Conference that the employee is a member of? In that scenario, is the employee allowed to vote? That would appear to be a conflict of interest.

A: It's only conflict of interest if the employee was involved in a vote on something that would affect their job. They can vote on any issue that the conference comes up with but if in some way it has something to do with the employee's job or the store then they shouldn't be involved in the vote!

(11/05/2015) Q: When we have a SVdP store, anyone including Vincentians may buy the items in the store. The funds would go to the poor either through paying expenses of the store or directly to the needy. Our Conference has food pantry and a collection of clothing donated by the parishioners. At times people donate other small items, kitchen items and tools. The following question was asked: "May a member (Vincentian) buy a donated item (just like in a store) with the funds placed in the Conference bank account for use in buying food for the poor, or other expenses?"

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A: This actually is a sticky one. When you operate a store, then your customer base is open to anyone. When you do what you are describing, even if everything is above board, you open yourself up to accusations of favoritism and self-serving. It is not a good idea.

(11/05/2015) Q: We have a situation where one of our members introduced a person at one of our meetings, about a year ago. We haven't seen this person since. This person's name got added to our active membership list by the member who introduced him. Our member works on a job with that person. The member changed that person's name to our associate membership list. My question is, if the associate person happens to come to a meeting, are they permitted to vote on our issues?

A: According to the Rule, Part III, Statute 3 in summary, an Associate Member is someone who helps us with our works of service. He/she may or may not be Catholic. He/she may not attend meetings regularly. An Associate Member cannot vote and cannot be an officer of the Conference. Many Conferences throughout the country have Associate Members. A couple of common examples are 1) a non-Catholic spouse of an Active Member who helps out and 2) someone who wants to help by maintaining the food in the pantry but doesn't want to take part in meetings or other activities of the Conference.

No one should be considered an Active, Associate, or Contributing Member without the Conference as a whole agreeing to it. So, all new members should be formally approved by the Conference. There is no special interview process or checking that has to be done except that they meet the criteria specified in The Rule.

(11/12/2015) Q: I know that the Conferences are supposed to operate under Robert's Rules of Order, in voting matters. Of course, Robert's Rules did not take into consideration the technological means of communications we have today. If our Conference has opportunities to vote on issues like, dollar amounts to approve for Twinning with other Conferences, International Twinning, Education Fund for Haitian children, etc., and we do not have time to address these matters in our regular business meeting, is it permissible to conduct motions, discussions, and even votes, from our members, via Internet email voting?

A: It's not so much about Robert's Rules of Order. Robert's Rules can be very constraining. However, they are good for ensuring propriety. According to the Nationally Approved Bylaws for Conferences, every active (full) member is entitled to one vote and that member must be present to cast the vote. This eliminates proxies and electronic voting. In addition, voting is only valid when a quorum of members is present. Although meetings are only valid when ALL members are invited to attend, a quorum is a majority of eligible voting members. So if your Conference has 20 active (full) members, there must be at least 11 present at a meeting that all members are aware of for any business to take place. Then, the Rule specifies we are to have at least two meetings per month.

What you are indicating in your question could eventually lead to no meetings and just doing business over the phone and/or by email. This is not what the Society is about. It's not about doing business - it's about spirituality, fellowship and service. The amount of time you have for various items to be discussed and voted on is under the control of the president of the Conference. He/she

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facilitates the meeting and should be ensuring that there is sufficient time to discuss all matters and cutting short any discussions that go too long.

After my extended answer to your question, the short answer is "no." There are times when an emergency comes up that can justify contacting all members by phone or email, but those are rare and should be restricted to emergency situations.

(11/12/2015) Q: Is it allowed, or permitted, for an associate member to "go on a case with an active Vincentian?" Can an associate member take an active part in deciding what should or should not take place with a case once a case has been visited by an active Vincentian and this associate member?

A: If an associate member is allowed to go on home visits it means that the Conference has confidence in their judgment. It would be wrong to take an associate member along on a home visit just to fulfill the two Vincentians rule.

(11/19/2015) Q: I know what the Rule states regarding membership. Full members are Catholics with full voting rights. Are there exceptions to the Rule regarding full members not being Catholic and having voting rights? So, no matter how active these members are, they are associates, correct? I just want a confirmation. It doesn't seem Christian to have members who attend all the meetings and participate fully in all the Council and Conference events and yet not acknowledge them as full members. And, I'm not saying let them be officers ... I'm just saying full members, since they participate in all the activities.

A: To be an active (full) member, you have to be Catholic. And, only active (full) members have a vote (when votes are taken). Remember, the Rule states that consensus is the normal mode for decision making and formal votes should only take place when necessary.

(11/19/2015) Q: Are contributing members no longer a classification in the SVdP Quarterly and Annual Reports? This classification should be disregarded and not included in total Vincentians. The preparation is redundant if not included in total Vincentians???

A: The "contributing members" classification is still valid, we just don't ask for the number of contributing members on the annual report.

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.

(11/26/2015) Q: A situation has arisen at a conference. A member has taken the position that before food is distributed from their food locker operation, each client must participate in a group prayer. Members are currently praying as a conference before distribution and inviting clients to pray after if they wish. The organization providing the food has an issue with compulsory prayer. Is there anything in the Rule, manual, etc. on this issue?

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A: There is nothing in the Rule regarding this. However, it is inconsistent with traditional SVdP work. Our Vincentians must understand two things: 1) our Lord did not require prayer before He helped people (He encouraged faith, but His love is unconditional), and 2) the organization providing food can rightfully stop providing food (this has happened in other parts of the country). You will find that Conferences throughout the country do not require prayer before giving assistance.

(11/26/2015) Q: I'm an active member of our St. Vincent de Paul Conference and working on recruiting new members. I read somewhere in SVdP documents that it's best to keep active members to about 10 and associate members to about 20. We have 8 active members but no associate members. Can you tell me where that document is located?

A: There is no known document at the National Council suggesting the ideal number of active or associate members. The absolute minimum number of members needed in a Conference is four, which are the officers; or 5 members if a spiritual advisor is appointed. A minimum 6 or 7 members are suggested to really have an effective Conference. Basically, it depends on the number of activities and what the Conference is accomplishing in terms of the needs of the community that is being served. In the U.S. on average there are 22.9 Active and Associate Members combined per Conference

(12/03/2015) Q: In continuation to last week's Q&A on members praying before food distributions and inviting clients to pray after if they wish. Is there anything on this issue?

A: In Frederic Ozanam's 1848 address to the General Assembly of the Council General, "Let us only introduce religion into our conversations when it comes up naturally. It is to be feared that an overzealous desire to convert people merely produces hypocrites."

In Ozanam's eyes, visiting the poor in their homes, an indispensable task of the members, should be carried out in a spirit of humility. ("Ozanam," Commemorative Book page 24, ©1997).

(12/03/2015) Q: I hope you can help me. A Conference president just called me to see if they can change the name of the Conference to the founder's name that recently passed away. Would you please let me know if there are any guidelines on the Conference name?

A: Conference names are usually associated with the name of the parish in which they are located. They can be names of saints, titles of Our Lord or Our Lady. They cannot be "St. Vincent de Paul" or "Frederic Ozanam" unless that is the name of their parish. They cannot be named for one of their members or anyone else.

Conference naming specifications come from the Council General International (CGI) and are used in the validation of an application for aggregation. In addition, we have a standard naming convention for Conferences: "Society of St. Vincent de Paul _____ Conference."

(12/10/2015) Q: I am taking office as a new Conference president. I would like to have an audit done for our Conference. Is it proper for me to do so?

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A: Yes. The Rule is not explicit on this but it has been the tradition of the Society for Conferences to have an informal annual audit. It is especially recommended when a new President is taking office. This helps assure the Conference members that they are following proper procedures and all is well.

Of course, if all is not well, then corrective action must be taken. If you go to www.svdpusa.org and go to the SVdP Members information, under Membership, you will find a tab for Best Practices. In the Best Practice category for Conference concerns, you will find a sample of an audit procedure for Conferences.

In addition, audit procedures can be found in the Treasurers Manual, which can also be found on the same website, under Documents: Council/Conference. In the Rule, Part III, Statute 27 authorizes a Council president to call for an audit when he/she determines it is appropriate.

(12/10/2015) Q: Our Conference occasionally needs to order things online and we don't want to use a debit card from our checking account. I am applying for a special credit card from our bank that is for non-profits. But in the application they ask for "Proof of Legal Identity" by supplying one of the following documents:

Articles of Incorporation, Trust Instrument, Secretary of State Filing, Certificate of Good Standing or Government-Issued Business License. I looked in the Governance in a Box and could not find any of these documents. Do you know if individual Conferences have these documents or are they all controlled from our National Offices? We use our Council's Tax ID number and we are included on their IRS Form 990. We do not have a separate Tax ID number.

A: You should work with your Council to set up your debit card account. This matter should be based on who the legal entity is, or whose name the EIN# is listed under. If the Council is the legal entity and not the Conference, you must work with your Council to obtain the 'proof of legal identity.'

(12/17/2015) Q: In continuation to last week's Q&A on if it is proper for new Conference presidents to conduct an audit:

A: Although the Rule is not explicit on the implementation of an audit, Conference bylaws are very specific under Article 16 which states "each Conference will undertake annually, an internal audit and report the results to the District Council or next higher Council."

There are a significant number of Conferences throughout the country who have not yet formally adopted the Nationally Approved Bylaws. However, once adopted and for those Conferences that have already adopted the bylaws, Article 16 should take precedence.

(12/17/2015) Q: Our Council is currently involved with the nomination and election process for the president of our District Council. I volunteered for the position of chairman for the nominating committee. I was immediately confronted by a couple of board members as to who is eligible for the nomination to the president's position. It was their understanding that only the current board members are eligible to be considered for this position.

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In reviewing the National SVdP Bylaws specifically Document 6, Article 12, page 116 it is my understanding that any full (active) member who meets the criteria in paragraph 4 are eligible to be nominated for the position of District Council president. I would appreciate clarification of these opposite positions of our board members. This would clear the air as to how the nominating committee should proceed in the election process.

A: According to the National Council approved bylaws, any active (full) member is eligible to be a candidate for office in the Society at any level - eligibility for candidacy does not make them qualified. The only exception to this is if your District Council is using a set of bylaws that specifies something different. If so, we would have to check to ensure they are in compliance with the Rule of the Society.

Q: (12-30-2015) In the E-Gazette, there was a notice related to “Christian Brothers Offers Investment Screenings for Catholic Values at 2014 Midyear Meeting.” If we are not to hoard our funds, then how do we have funds to invest?

A: Many Councils and some Conferences have stores and special works that have paid staff and fixed expenses. Prudence in operating those stores and special works requires that they have reserve accounts to cover operations in hard times. This is not hoarding. Those reserve accounts may be invested. The normal Conference and Council with no stores or special works have no need for reserve accounts. The Rule does allow for reserve accounts under certain circumstances. This does not mean that Councils/Conferences with stores or special works cannot be accused of hoarding. Hoarding comes into play when the Council or Conference has more funds than they need and make decisions in favor of banking rather than helping.

Q: (12-30-2015) Considering the Church’s stance, does the Society have a right to refuse service to an unmarried couple, specifically providing them with a motel/hotel room stay in one bed?

A: There are a lot of moral issues that present themselves to our members over time. The issue you present comes up on occasion - providing, hotel/motel room for an unmarried couple. 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.

Q: (01/07/2016) In our District Council, there are a few Conference presidents who rarely, if ever, come to District Council meetings. What is the best way to handle this?

A: That has never been an easy scenario to address. There are lots of considerations. 1. Did you ask directly why they are not attending? Addressing the answer may be simple. 2. What do your bylaws say

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about non-attendance at meetings? Some identify a maximum number of meetings that are permitted to be missed before the Conference loses its vote. Understand that this punishes the Conference – not the president. You don't want this to take place. 3. If your Council is providing any benefits or perks to the Conferences, you can withhold them until they start attending District meetings regularly. 4. It may be that the District meeting is providing them with nothing, so they don't come. You may need to look seriously at the meeting and what you are providing. 5. If the president is unable to come, he/she is allowed to send a proxy – just as long as someone represents the Conference. If the president refuses to attend and refuses to send a proxy, you may have to get your Diocesan Council president (if you have one) or your regional vice president involved in correcting this situation (possibly requesting the removal of the president and holding a new election). As I said above, there's no easy answer. The Rule of the Society obliges Conferences to participate in the District Council. The Conferences are expected to fully participate in the meetings and activities of their District Council and are encouraged to participate as fully as possible in the higher Councils of the Society. The Rule, Part I, Article 3.6 and the Manual (pages 33-41) emphasize the importance of Councils. In the book "Vincentian Leadership – Conference President" it states on page 38: "One of the worst things a president can do to his Conference is to shut it off from the rest of the Council. The only losers are the Conference and those we serve."

Q: (01/14/2016) Our Conference, which operates a store, is looking into purchasing its own building, how much money should we keep in reserve?

A: You have two separate issues here. One is your reserve account and one is the purchase of a building. The normal recommendation for a reserve account is that it should cover normal operational expenses for a period of six months. This could be accomplished simply by taking 10 percent or another percentage of the store's income each month and placing it into the reserve account until it reaches its specific cap. On the building issue, you can look at it in a couple of ways. First, you can develop a building fund campaign in which you ask for donations specifically for the purchase of the store. You cannot allocate normal donations to the Conference for this purpose since that is not what people give their money to SVdP for. People donate to the Conference to help those in need - not build up bank accounts or build structures. Another possibility is taking another percentage of the store's income and set it aside into the building fund. I understand that most Conferences that operate stores depend on that income for assisting those in need. Putting money into a reserve account or a building fund from the store's income reduces the amount available to help those in need. It is a choice you will have to make to reach your goals.

Q: (01/14/2016) Some members of our parish are interested in opening a shelter and food kitchen (meals to be served is assumed here). A nonprofit in town has a building and they are willing to lease half to this parish group. The parish group is asking our Conference to pay part of that monthly rent. What should we be concerned about in this?

A: If it is a simple concern of the parish group asking for a monthly contribution toward this rent, the answer is "no." The Conference is not allowed to give money to another organization, no matter how good the cause.

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If it is a case where the Conference will formally participate in the operation of the shelter and food kitchen, a contribution may be made; however, there are a number of concerns:

1. Who will actually be responsible for the operation? The group (parish or SVdP) would have to be concerned with IRS qualification and reporting. A normal 501(c)(3) does not cover the operation of a shelter. Shelters require a special IRS exemption.
2. The EIN of the parish or SVdP is a consideration here. Reporting will have to be done by the entity that operates the shelter and kitchen.
3. Insurance is another consideration. The operation of either a shelter or a kitchen has a high risk (more so when both are the consideration) and is not covered under the normal insurance coverage associated with a parish or a Conference.
4. Guidance from a CPA and/or attorney familiar with these types of operation should be sought.

Q: (01/21/2016) I have had several Vincentians in our Conference approach/suggest that we enhance our Vincentian spirituality more by offering prayer books, offering spiritual mentoring, guidance, experiences, etc. to our friends when we do home visits. We do ask permission to pray with our friends at the end of our home visits and we ask them if they, as a family, have a home church they attend. However, because when I read the Rule, regarding conducting home visits, I do not find anything there about this type of work, and I know we are not supposed to proselytize to our friends, I am wondering how we walk this fine line, of offering them spiritual assistance, but not proselytizing. Do you have any advice on this matter you can share with me?

A: First, I want to disagree with you on one point. I don't believe that it is a fine line that may or may not be crossed. I believe there are three levels of spiritual influence in the Society:

1. First are the far majority of Vincentians who feel inadequate in this area and really avoid faith discussions with those we serve. They may be willing to pray with those in need but will not discuss matters of faith.
2. There are those Vincentians who are comfortable in praying and discussing matters of faith and who are welcoming and encouraging. This is where Vincentians should be.
3. Then there are those who aggressively promote the faith. Some of these members even bargain with assistance. This is where we should NOT be.

Remember, we are Christ's hands and feet. Jesus did not aggressively promote the faith. He was sometimes challenging, but always welcoming and encouraging. We promote the idea that Vincentians see the face of Christ in the poor. The reverse is also true; we hope those we serve see the face of Christ in us.

Q: (01/21/2016) Would a vote by a president who has been in office for over six continuous years count? If not, and there is tie, it is my understanding that people must continue to vote until there is a successful election. Right?

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A: Regarding a president that is out of term, that person is still president and can vote, unless he or she has either resigned or has been removed by a higher Council. In that case the vice president assumes the duties of president until a new president is elected, then the vice president can cast the vote. According to the election procedures, a method is supposed to be set up in advance to deal with tie breakers.

Q: (01/28/2016) Our Conference frequently visits clients in need of vehicle repairs to their car. Our Conference has some volunteers to provide labor to install parts for certain types of service, such as brakes and rotor installations, tie rod replacements, etc. The volunteers are not registered mechanics or shop owners. Does our Conference incur any liability if we provide parts for installation by our volunteers? Does the Conference incur any liability if the parts are provided to the volunteer installer of the client?

A: There is a liability associated with vehicle repairs to client cars because we are providing service and if it is not done professionally in an automotive repair shop. There is no liability in providing parts to an individual unless it can be shown that we provided them with faulty parts. If an individual works professionally in an auto repair shop, there is limited liability that is up to the courts to determine should a claim be filed.

Q: (01/28/2016) Can a Conference have paid staff?

A: Conferences can have paid staff only typically for a thrift store or a special works. Although not stated in the Rule, paid staff as a rule of thumb are generally not hired to perform Conference works.

Sometimes Conferences want to hire someone to do their bookkeeping but that should not occur since this is an officer of the Conference leadership duty. Conferences that do hire paid staff must have their own EIN #. If the Conference is using their Council EIN # then the Council would be the employer.

For instance, client interviews and assistance should be given by two members of the Conference - not by paid staff. It is part of our ministry and responsibility as Vincentians. The purpose for paid staff in thrift stores and other special works is to help members do their work - not do it for them.

(02/04/2016) Q: If deacons and priests are not the decision makers of the Conference, can they tell us how many food drives we can or cannot have during the year or that we cannot have any food drives?

A: Since the Society is a lay organization with the church, we must abide by and within the priest/parish guidelines and boundaries. If the priest does not support the Society's desire to hold food drives at the parish then we must honor his request. Perhaps a food drive can be held outside of the parish such as a grocery store with the manager's approval.

(02/04/2016) Q: We have a separately incorporated store that is choosing to operate independently from the Council. What do we need to consider in discussing this with them?

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A: Every effort must be made to recover the members and store operation. However, the following are considerations related to what might occur.

- 1) All entities of the Society operating within a Council area are subject to the authority of that Council regardless of whether or not they are independently incorporated.
- 2) The authority of the Council is recognized and acknowledged by the Council General International when the Council was instituted.
- 3) Failure of the store or special work to recognize that authority is grounds for that entity to be removed from the Society. This does not give the store or special work authority to continue in operation outside of the Society. The assets of the store or special work were acquired under the name of the Society and, therefore, the store or special work must be dissolved and the assets returned to the Society.
- 4) In some cases, actions may warrant formal removal of some members from the Society.

Possible outcomes are not absolute, every effort must be made to reconcile and recover.

02/11/2016) Q: I have been told that I cannot be an active member because I go to Florida for about four months during the year. I am told that for the purposes of meetings I should not be counted as a member because it will mean that it will ruin a quorum. I am told that in an Annual Report I should be listed an associate member. I cannot vote on any matters because of this year requirement?

I do more work than our other "active" members and attend ALL meetings, conduct interviews in Spanish (the only one) and do legal work if needed for our guests. I hate to resign over this rule?

We are a volunteer group and there are only a few of us, why make it so hard? While I am in Florida, I work with St. Theresa's Church so I am still working the whole year for SVdP?? Is it about a quorum or is it about helping the poor? There is another member in the same position. We are both upset with this rule and if we cannot be counted as active members and be allow to vote on important matters, perhaps we should not be counted at all?

A: There is nothing in the Rule that prevents a member from being an active member so long as he/she is Catholic and attends the majority of the meetings. The member can ask for a leave of absence, which only means that they are excused until they resume attending meetings. As long as the excused absence is valid, a member is not counted when absent as a part of the quorum.

Members are allowed to leave temporarily and not be removed from the Conference. We have snow birds all over the country and they are still considered active members when they leave their home Conference area for a few months during the year. Conference members should accept an active member's leave of absence automatically; however it doesn't hurt for Conferences to formerly approve a leave of absence. Either way, active membership should remain intact in situations such as what you've described.

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(02/11/2016) Q: We have a Conference in our Council that wants to withdraw from the Society. What do we need to consider in discussing this with them?

A: Every effort must be made to recover the members and Conference. However, the following are considerations related to what might occur.

- 1) The Society is an independent lay organization.
- 2) When the Conference joined the Society, it agreed to be governed by the Rule and Bylaws of the Society.
- 3) The Rule, Part III, Statute 24 indicates that Conferences and Councils zealously manage and maintain the Society's assets. If the Conference withdraws, the assets fall under the control and management of the Council.

There is a document, "Dissolution of a Conference," that covers all of the consideration and procedures. It can be found on www.svdpusa.org on the members site under information Downloads.

(02/18/2016) Q: Our relatively small Conference spends a little over \$60/month for gasoline out-of-pocket as we service those in need through home visits. The tradition of passing around a bag at meetings to ask for more money doesn't seem appropriate. I understand the history and meaning behind the bag. Is such a practice optional?

A: Conference member donations are an expectation and not a requirement. It is a voluntary contribution made by members for funds to help those in need. Many Conferences use it for other purposes, such as for out-of-pocket gasoline, as long as the majority of other members agree to its use. Reimbursement for expenses incurred in serving those in need is legitimate as long as most of the members agree.

(02/18/2016) Q: There are 13 Conferences in our District. Does that mean that only the 13 presidents (or their proxies) and the current Board members are allowed to vote, or any Vincentian that attends the meeting?

A: According to nationally approved bylaws when it comes to matters of the District Council, voting members are the District and Conference presidents only.

(02/25/2016) Q: I have a Church member who works in the pantry one day each month and does not want to join SVdP. Is he still covered under the insurance policy?

A: The church member, who works in the pantry one day each month, is considered to be an "associate" member of the Society. If you have liability insurance coverage, he/she is covered should a lawsuit be filed so long as the Rule is followed.

For example home visits, the Rule requires home visits be made in pairs of two, thus if a claim were filed as a result of a home visit and only one Vincentian visited a client; insurance would not cover the single Vincentian that visited the client.

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(02/25/2016) Q: Active Membership for SVdP states that the individual must belong to the Catholic Church. We have denominations other than Roman Catholic in our area. We also have Evangelical Catholics. Because the definition of Catholic is not specific, does it therefore mean any Catholic can become an Active Member?

A: The Rule, Part III, Statute 3 identifies clearly the membership types. 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. Catholic membership can also be anyone who is part of a church that is in communion with Rome. For instance, Maronite and Byzantine Catholics are in communion with Rome and thus members of these affiliations can become members of the Society once approval is granted by the Roman Catholic Bishop and the Bishop of said affiliations. Only Active (Full) Members hold office in the organization.

(3/03/2016) Q: Our Store Advisory Committee does not have representation from one of the three Councils that are responsible for the store. It has been very difficult for the District Council president or Diocesan Council president to find members that will serve. It is very important that that area of the store community have a consistent voice in store issues, and store tasks.

The Council president, the Store Committee chair and Diocesan Council president agree that we need a community member at the table, even if it is not a Vincentian. Our bylaws do not prohibit it as long as we follow the process of appointment. Sometime ago, I read that it is possible to do so; I just want to make sure that nothing has changed that would prohibit us taking this step.

A: 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.

Thus, it is possible to appoint board members who are not Vincentians as long as the majority of the board consists of active Vincentians. Non-Vincentian board members are not eligible to vote.

3/3/2016) Q: If someone served in the past as a Central Council board member, but isn't currently serving or contributing, are they still considered a Vincentian based on their prior service?

A: A past Central Council board member no longer serving or contributing can be considered an associate member. The individual cannot be considered an active member if they are not actively involved with the Society.

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(3/10/2016) Q: I have heard, unofficially, that the United States Conference of Catholic Bishops has voted to remove SVdP 501(c)(3) coverage from the Diocesan listing. Is this correct?

A: We were told a few years ago that this would happen. We were not given a specific date. However, about three fourths of all SVdP Councils have already been removed from the Official Catholic Directory which was the basis for their tax exemption. The National Office spread the word and recommended that Councils and Conferences make an effort to get their own independent 501(c)(3). Since then, National has acquired its own 501(c)(3) and been approved as a group ruling. To this date, over 1,800 SVdP Conferences and Councils are part of this group ruling, but there are still over 3,000 SVdP units who have not switched over. We have already heard reports of IRS not recognizing SVdP units as tax exempt. This can have a significant impact on donors.

(3-10-2016) Q: A Conference is intent to hire an executive director for their food pantry operation. In an earlier inquiry you indicated that in a Conference, it should be all volunteers. This president insists that there is nothing at National or in the Rule that precludes them from hiring someone for their special work. Is there specific insurance required or does one part time person not meet the minimum number? Does this put the Council at risk?

A: Conferences can have paid staff for a thrift store or a special works. Although, not stated in the Rule, paid staff, as a rule of thumb, is generally not hired to perform Conference works. For instance, client interviews and assistance should be given by two members of the Conference – not by paid staff. It is part of our ministry and responsibility as Vincentians. The purpose for paid staff in thrift stores and other special works is to help members do their work – not do it for them.

One thing to keep in mind is that if the Conference does not have its own EIN # and is using the Council's, then the Council would actually be the employer and not the Conference; of which the Council would compensate the paid employee.

(3-17-2016) Q: When a Conference puts someone up in a motel, who is liable for any damages, etc.? The client? The Conference?

A: The resident/client is responsible for any motel/hotel damages; not the Conference or Council.

(3-17-2016) Q: Our Conference is located in an area without public shelters for homeless families or public transportation. A private organization shelters homeless families for two to three months so that they can save resources to be able to provide their own permanent housing.

We would like to send the organization a monthly donation to help with transportation costs, etc. We feel that the housing that this organization provides would help our Conference to save on hotel expenses. Is this allowed according to SVdP regulations?

A: According to the Rule Part III Statue 26, this is not allowed. We are not allowed to give our funds to another organization - no matter how good the cause - not even our own parish. The funds

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were given to the Society to use in fulfilling our mission - not to give to other organizations to fulfill their missions.

(3-24-2016) Q: At the bi-monthly meetings of our Conference a financial report is always given and incorporated into our minutes. But at our Council's quarterly meetings a financial report is never given either verbally or in writing. Does the Rule of St. Vincent de Paul require a financial report at Council meetings? If not, how should members be informed about Council finances?

A: Every treasurer is required to provide a formal report at every Conference and/or Council meeting. This is a requirement of the office of the treasurer. The treasurer keeps up-to-date financial information, which is reflected in the treasurer's report at each meeting. In this way, the true financial condition of the Conference and/or Council is known at all times. Funds belonging to the Society have always been, and must always be, kept separate from the treasurer's personal assets. If the treasurer's report is not being provided at meetings, it is a violation and should be reported to the regional vice president for Council meetings where no treasurer report is given and for Conferences not doing so to their District Council president. For additional information, please refer to the treasurer's handbook.

(3-31-2016) Q: A question arose recently as to whether it is permissible for the treasurer or other officers to sign blank checks at the beginning of the week and leave them in the checkbook which is stored in a locked file cabinet, which only members could access. This would assist the treasurer or other officers from having to come in to the office every time a member handled a case for a client.

A: It is not permissible for a treasurer or other officers to sign blank checks at any time. This is not an appropriate accounting practice. We should never leave signed checks lying around, no matter where they may be kept. The treasurer should sign checks specifically as needed. No pre-signed checks should occur. An accountant (CPA) would not approve this practice and thus if an audit were conducted, this practice would be reported as an improper accounting procedure.

(4/07/2016) Q: I'm president of a Conference. The Archdiocese has notified the pastors requiring us to add the pastor as an authorized signer. These guidelines are going to all parishes in the diocese. This seems to be in direct conflict with the U.S. Manual of SVdP. We cannot collect any further funds until we comply. Can we get guidance from the national SVdP?

A: Because the Archdiocese is specifying something that is contrary to the Society's Rule, this matter needs to be brought to the attention of and addressed by the Region VP and Archdiocesan Council president/NCM.

(4/07/2016) Q: I have a question on the Rule, Part 1:3.14. It states that the Society may not allot funds to other organizations, except occasionally for other branches of the Vincentian Family, save under exceptional circumstances.

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Can you define for me what the highlighted part means? Does it mean exceptional circumstances within the Vincentian Family, or does it mean we can allot funds to another organization outside of the Vincentian Family, under exceptional circumstances? The question came up and I wanted to make sure I had the correct answer.

A: "Save under exceptional circumstances" means that we can allot funds to other members of the Vincentian family for uncertain conditions or "exceptional circumstances." For example, if there is a disaster and SVdP has no presence in the community but present are Daughters of Charity or Congregation of Mission order priests (both of the Vincentian Family), then we can allocate funds to them. No organizations outside of the Vincentian Family can be considered as "exceptional circumstances." Please see the Rule, Part III: Statute 26.

(4/14/2016) Q: Is it permissible to handle requests for assistance from repeat callers via a telephone call? Our Vincentians will typically make an in-home visit to a client. Sometimes a follow-up telephone call is made to the client in respect to their assistance request for which the in-home visit was made. Sometimes weeks or months after this request is resolved, the client may call back and make another request for assistance. May our Vincentians handle these calls via a telephone call instead of another in-home visit?

A: Most of the calls received should be handled through a home visit, but a determination has to be made individually; case by case. If several months have passed since the last home visit, Vincentians should reacquaint themselves with the client's situation and not assume it to be the same. Therefore, it may be necessary to re-evaluate their circumstances.

(4-14-2016) Q: What is the responsibility of a new Conference that began this year after the start of the fiscal year? What types of reporting or annual dues are required?

A: New Conferences that begin during a given fiscal year need to fill out an annual report based on the portion of the year they were active. Solidarity contributions are excused until the following fiscal year assessment.

(4/28/2016) Q: I am currently the president of a Conference and have one year left of my term. I have also been nominated for the position of Council president. Can I hold both positions if I don't have someone to take over at the Conference level?

A: There is no Rule that prevents someone from being a Conference president and Council president at the same time. However, it is not recommended because of the amount of responsibility of both offices.

(4/28/2016) Q: Can a Council appoint two executive directors?

A: A Council can appoint two executive directors but you have to be careful as far as clarifying each of their roles and area of responsibilities and duties.

(5/5/2016) Q: Our Conference received some McDonald's stock a few years ago, and we would now like to convert this stock to cash. How do we do this?

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A: Stock received by a Conference can be converted to cash, however members should obtain financial advice related to how to handle this process. For best results, we suggest contacting the National Finance Committee chairperson on stock conversion and what route to take.

(5/5/2016) Q: Our Conference was given a considerable amount of canned goods for our Food Pantry Special Works. We cannot use all of it so we decided to give some to another Conference. Is this considered "twinning"? If it is, how do we report in-kind twinning? Is there a "formula" for estimating the value of in-kind food donations?

A: The original Conference that the considerable amount of food was given to does not report it. There is no place on our annual report for the giving Conference to record what it gives to another Conference, except for money. The second, or receiving, Conference that the food was donated to by the original Conference reports it as in-kind donation. Food donations are not considered twinning because twinning on our annual reports refers to money only. The "value" should be your best guess based on the estimated retail value of food in your community.

(05/12/2016) Q: SVdP's National president has just asked all Vincentians to write to their congressman to support a managerial minimum wage rule. What process, i.e., board voting, executive decision, etc., does the Society take to endorse any legislative efforts?

A: The National Voice of the Poor Committee's position is that the Society can endorse legislation but not candidates. The VOP committee identifies legislation that we should either vote for or against.

(05/12/2016) Q: At the national meeting there were papers on the relationship of pastors and Conferences, Extension/Revitalization team roles and responsibilities, and the Extension and Formation Initiative Revitalization Toolbox. Where can I find these on the web site? I looked at several different places and could not find them.

A: Here is the web link for all Extension & Revitalization materials:
<https://files.constantcontact.com/fd89f49d001/1e8bc429-bb01-47ac-830f-3247d8af21a7.pdf> Once there, scroll down three quarters to the tab: Extension/Revitalization. There you will find all the materials available from the National Council office on this subject.

(5/19/2016) Q: In continuation to last week's Q&A, the process used by the Society and President Sheila Gilbert in identifying federal legislation and policies for which Vincentians are encouraged to advocate was briefly described. Can you elaborate on that? What's the role of the Voice of the Poor Committee? What kinds of collaborative efforts occur with other Catholic agencies concerned about social justice? How are ideas developed and how are they vetted?

A: Before issuing an Action Alert on pending federal legislation and policy initiatives affecting the poor and marginalized, President Sheila Gilbert typically receives input and advice from the Society's national Voice of the Poor committee. That committee is comprised of two volunteer Vincentians, called Regional Voice of the Poor Leaders, from each of the Society's eight regions in the United

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States. The committee is continually monitoring federal legislative activity and working cooperatively with other Catholic organizations, such as the U.S. Conference of Catholic Bishops and Catholic Charities USA, to identify priority areas of social justice concern and to formulate positions that are in accord with Catholic Social Teachings, with our Vincentian call to charity and justice, and with the Society's officially approved position papers on various social justice topics.

The Committee strives to focus the Society's legislative attention primarily on issues which Vincentians routinely encounter in their personal outreach to those in need, namely, the practical problems of those in poverty that are caused by hunger, imprisonment, addiction, the lack of jobs, training and education, health coverage and adequate housing.

Sometimes, individual Vincentians or the Society's leadership ask the Voice of the Poor committee to study an issue to determine whether an Action Alert may be appropriate and warranted.

Efforts are made to be selective in choosing the issues for which advocacy is recommended so that our "voice," when raised, is truly heard and the membership itself does not become burdened with non-productive requests.

Action Alerts are issued through the Society's Capwiz system. All Vincentians should sign-up using this Internet link: http://www.capwiz.com/svdpusa/mlm/signup/?ignore_cookie=1.

On national matters, it is important to remember that only President Sheila Gilbert can "speak for the Society" (Vincentian *Manual*, page 41).

More information about the Voice of the Poor Committee, its programs and the Regional Voice of the Poor Leaders can be obtained from committee chair Tom Dwyer (tdwyerma@comcast.net) or by visiting the website Voice of the Poor portal - <http://www.svdpusa.org/members/Programs-Tools/Programs/Voice>

(05-26-2016) Q: Some of our Conferences have pantries where people come in and pick up food on a regular basis. Other Conferences take food to the homes during a home visit. Other Conferences deliver food as needed and not as part of a true home visit. In the past, our reporting of these activities on the "Special Works" form has been somewhat inconsistent. We'd like to correct that. We'd appreciate any clarification.

A: Anytime a Vincentian takes food to a family it is not a "Special Work," it's part of what we do with home visits; we take food with us or deliver groceries on home visits. However, if there is a pantry operation or on-site food distribution center where food is picked up, then it is a Special Work. These are two different services we provide. Therefore, there is no conflict.

(05-26-2016) Q: How do we report the number of people helped with cash, i.e. rent, electric, etc. There are sections on the annual report form for in-kind activity, but not for cash.

A: There is no separate count for the number of people assisted financially. We only track the number of people assisted by type of service: home visit, other person visit, etc. Expenses included under the treasurer's report reflects all funds used for goods and services provided to those we served, including cash, checks, certificates, bus tickets and gift cards. The main method for

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assistance with cash payments is checks paid directly to the provider of those goods or services. This also includes the cost of food purchased to stock food pantry items. For those Conferences that operate stores and other Special Works, this includes dollars spent for direct aid to those in need.

(6/2/2016) Q: Are Conferences prohibited from offering scholarships when the funds are available?

A: It all depends on whom the scholarship is for. Scholarships to an elementary school would be improper because education is free in all communities; and our position is that there is no purpose in serving the poor by paying to attend school. If the scholarship is for a college student, this would be considered a possibility and a valid undertaking because college is not free.

(6/2/2016) Q: My Conference is now on Facebook and has a Twitter account, this in addition to our website. Is it okay for us to use the Society's logo for our avatar in these mediums and in all official business?

A: All Conferences and Councils can use the Society's trademarks, which include logos, for official SVdP work. These cannot be assigned to third parties.

(6/10/2016) Q: A couple of new members, actually, husbands of active members, want to help when needed. Are they required to attend Ozanam Orientation within one year of joining?

A: All Active (Full) Members must attend an Ozanam Orientation within a year of joining the Conference. Associate members, which would be the membership category of the spouses you are referencing, are not required to attend. The Ozanam Orientation and Serving in Hope are the primary training programs for Vincentians.

(6/10/2016) Q: Should we not use in our advertising the name and the picture of a friend in need - even with their permission?

A: Using the name and photograph of our friends in need on advertisement is not a violation, so long as written authorization has been given to do so. Many SVdP Councils/Conferences have case record forms that have a disclaimer on it, perhaps it will work for this purpose; others have a separate release of information form for our friends in need to sign.

(6/16/2016) Q: Can a Vincentian become an active member of two Conferences? If so, should the Conferences be made aware of additional information?

A: A Vincentian can become a member of two Conferences. Conferences do not need to be made aware of any additional information. However, as a courtesy, both Conference presidents should be informed.

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(6/16/2016) Q: Does a Vincentian who is an active member of two Conferences have voting rights in each Conference? Is his/her membership counted twice in the annual reporting? If so, where is the citing that relates to this?

A: Yes. His/her membership should be counted twice in the annual reporting. Although allowed, it's not often that one person is a member of more than one Conference, so duplication of numbers is not significant. There is nothing written to cite this practice, hence, we must go by the Rule and what it says who an active member is.

(6/23/2016) Q: Are employees of St. Vincent Thrift Stores allowed to be voting members at the local Conference?

A: Thrift store employees are not allowed to vote at Conference meetings unless the store employee is also a full Conference member. The Nationally Approved Bylaws for Conferences say that each active member of a Conference has one vote and that vote must be cast in person. Non-Catholics may not be active members; they can be associate members and, therefore, cannot vote.

(6/23/2016) Q: How involved can a pastor be with the St. Vincent de Paul Society? I believe I read somewhere that SVdP is a separate entity from other organizations in the church, and that the pastor cannot tell us what to do with our donations (monetary). Are they able to tell us, for example, when, or if, we can or cannot collect food for the poor? When, or if, we can or cannot have more than two food drives a year, etc.?

A: You will find in both the Rule (Part III, Statute 15) and the Manual (pages 26 and 48), that 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. Hence, 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 of the Conference. In fact, ordained ministers may not vote or hold office or be a signor on Conference accounts.

SVdP is a lay organization in the parish at the invitation of the pastor. We must, therefore, maintain good relations with him and the parish staff. As long as there is a good working relationship between the pastor/parish and the Conference, there should be no concern. If so, feel free to ask your District or Diocesan president to meet with your pastor and try to resolve any issues or concerns the Conference members may have.

(6/30/2016) Q: A Conference president believes they are in their fifth year in office because they served as co-president the first year. Does serving as a co-president count toward the six year term limitation as a single president?

A: The National Council does not recommend co-presidency. But, a co-president's term is separate than serving as an individual president. The fact is serving as a co-president cannot be counted as serving individually alone, and as recommended.

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(6/30/2016) Q: We have a spiritual advisor that is an ordained deacon. What is his role in the Conference? Can they participate in Conference discussions? Can they be elected as president or appointed as an officer?

A: It is stated in the Rule (Part III, Statute 15) and the Manual (pages 26 and 48) that ordained ministers (deacons and priests) can only serve as spiritual advisor of a Conference or Council. They are asked to give spiritual guidance to the Conference members related to their own personal growth and ministry. They can participate in any of the discussions and can 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.

(7/7/2016) Q: We have two Conference members that for the past eight years have not done any personal contact with the poor, but they do have a say on how we help those in need. Is there anything in the Rule that states they have to be involved person-to-person with our friends in need? If so, where is it written and where do we go from here with that?

A: To be an active member you must be Catholic, attend meetings regularly and participate in the works of the Society, which is helping our friends in need. However, this does not mean that someone who works in a pantry and doesn't do face-to-face home visits but is still active isn't a member, so long as they are doing works of the Society and not just attending meetings.

(7/7/2016) Q: Are there any general guidelines on interviewing our friends in need in regard to aid for food or other aid such as power bills or rent? Is there a guide for interviewers on do's or questions not to ask?

A: There are no official policy guidelines set by the Society for providing assistance; each Conference establishes its own operating guidelines. What we are looking at is helping people who need help and providing compassionate aid to the needy regardless of their circumstances. Part 1:1.3 of the Rule states, "No work of charity is foreign to the Society. It includes any form of help that alleviates suffering or deprivation and promotes human dignity and personal integrity in all their dimensions." Part 1:1.4 says, "the Society serves those in need regardless of creed, ethnic or social background, health, gender, or political opinion."

Also, there is no specific guide for interviews. However, we do recommend using instructions given in the Ozanam Orientation on 'home visits.' Another suggestion is to view case record examples given in the secretary manual.

(7/14/2016) Q: In continuation to the answer provided in last week's question #2, are there any general guidelines on interviewing our friends in need? Is there a guide for interviewers on do's or questions not to ask?

A: Guidance for home visits and interviews can be found in two new books on the Extension Portal website under the category of Training: Vincentian Life: Conference, and Vincentian Life: Member.

(7/14/2016) Q: Conference associate members typically do not attend most meetings. Can associate members who are Catholic vote?

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A: An associate member is someone who helps us with our works of service. He/she may or may not be Catholic. While not expected, he/she may attend meetings regularly if they choose to. An associate member cannot vote and cannot be an officer of the Conference. Many Conferences throughout the country have associate members. A couple of common examples are: 1) a non-Catholic spouse of an active member who helps out, and 2) someone who wants to help by maintaining the food in the pantry but doesn't want to take part in meetings or other activities of the Conference.

(7/21/2016) Q: Are all three levels of membership eligible for the Award? It would seem that the 'spirit' of the Top Hat Award is to nominate someone who is an Active or Associate Member, but not necessarily someone who is a Contributing Member.

A: The Top Hat Award is a local award given by the local SVdP Council, who decides what the award is being given for. The National Council has no guidelines for this award and does not determine which membership level is eligible to receive it. This is a decision for the local Council itself.

(7/28/2016) Q: Some of our Conference members give their personal phone numbers by not blocking their numbers when making calls. As a result, our friends in need call them for advice, etc. The Conference members do not always report the calls received or the advice given. Some Conference members purchase Christmas gifts with their personal funds, which they deliver, along with a member of their family. Our guidelines say that our friends in need should not have our personal phone numbers. Also, we decided that messages could not be left on the SVdP phone. We can only be reached on Mondays 9:00 a.m. - 11:00 a.m. Is this practice okay? What, if any, are the ramifications of this practice? What do you think of this practice?

A: The National Council does not encourage nor endorse the practice of members giving out their personal phone number. Phones can be abused, and those whom we serve should only call a designated SVdP contact number for assistance.

Vincentians should refrain from providing help using their own personal resources, especially since those we serve will view the assistance as being provided by SVdP. We are not a personal ministry for individuals; we are a group ministry, and members should treat the Conference as such. If individual members want, they can donate resources directly to the Conference to assist others.

The ramification of the practice you indicated is that our friends in need have nowhere to turn to if the Conference can only be reached at the hours indicated. Therefore, it is recommended a separate phone line where messages can be left and checked more frequently by members in order to serve our friends in need.

(7/28/2016) Q: We are considering creating bylaws for our food pantry. Are there any available resources?

A: There are no separate bylaws established for special works. Generally, special works are governed by the bylaws of Conferences or Councils to whom they report to. However, this does not

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mean that special works cannot establish bylaws; the bylaws just have to correspond with their respective Conference or Council, and special works bylaws cannot be independent because they are not a separate entity.

(8/4/2016) Q: Can a deacon serve as chair for the Council's Voice of the Poor committee?

A: The Voice of the Poor is a committee, and committees can be headed by a deacon. There is nothing that prevents a deacon from being a committee chair. Being the chair does not give the deacon a vote related to the board or Council. A deacon who is the committee chair can vote on committee matters since committees do not make final decisions and only serve as advisors.

(8/4/2016) Q: If a Conference were to receive a large donation, i.e. \$100,000, to be distributed to the poor and the needy in the area where the Conference is located, and members decide to distribute the funds in increments of \$25,000 per year over a four - year period, would this be in keeping with the use of money as stated in the Rule, Part I -3.14, in Part III -Statute 24, and in the Manual -Chapter 2.1 Funds of the Conference?

A: When Conferences get significant amounts of funds it is appropriate that they make a formal plan to spend it down. Thus, your Conference's decision to distribute \$25,000 a year over a four - year period is acceptable. However, if \$25,000 is spent before the year is up, additional funds should be allocated from the balance to help those in need.

(8/11/2016) Q: May a person who is a friend in need also be an active member of a Conference?

A: A friend once in need can indeed become an active member of a Conference so long as the requirements for an active member are met: is Catholic, attends meetings regularly and participates in the activities, works and life of the Conference. All three are important to be an active member. If #1 or #2 is missing, they are associate members. The Rule, Part III, Statute 3 identifies clearly the membership types.

In addition, 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.

(8/11/2016) Q: May we pay medical co-payments for our friends in need?

A: One time medical co-pay is not an issue. However, for ongoing medical co-pays there must be a strong consideration of the Conference with all members in agreement, to avoid long-term commitments to ongoing medical co-pays.

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(8/18/2016) Q: Can a person be registered in one parish and belong to a SVdP Conference of another parish?

A: Yes, a person can be registered in one parish and belong to a SVdP Conference at another. The Rule does not require Vincentian members to belong to the parish in which they worship.

(8/18/2016) Q: If we collect funds in excess of our needs, can we combine the excess funds into our general account, or must we maintain them in a "special works" category in our accounting?

A: Funds can be used as the membership body determines. A vote may have to occur if there is dissention. Excess funds collected for seasonal assistance (Thanksgiving, Christmas, Easter, etc.) do not have to be escrowed into a special works account for annual use. Our friends are in need daily and all resources should be available to serve those in need.

(8/25/2016) Q: If you have a pantry in your Conference, are you allowed to change the shopping list, for example, in the past a family of 6+ could receive 10 canned goods and then it was reduced to eight. Other items were also reduced on the sheet?

A: This is a local issue and should be addressed to local leaders. However, the reality is that, when you are providing food to individuals, you want the meals to be nutritious and well-balanced; and it doesn't hurt to customize the manner in which food is given to families in need.

(8/25/2016) Q: The president has appointed an assistant pantry manager who is not Catholic. This manager has virtually become the main person in this operation which is, by far, the biggest activity of the Conference. Is it okay for an associate member to take such a position?

A: It is not a problem for an associate member to become a pantry manager. An associate member can do a lot in Conferences, but it does not give them extra authority for Conference decision making. Decision making is done by active Conference members only. Also, keep in mind that associate members do not vote as full members who must be Catholic.

(9/8/2016) Q: Is St. Vincent de Paul a Third Order? It has a rule, vocation, annual renewal of promises and charisms.

A: The Society of St. Vincent de Paul is not considered a Third Order.

(9/8/2016) Q: How long can a person hold the office of interim president? I have searched the Rule and cannot find this topic mentioned.

A: When a president resigns or is no longer able to fulfill his/her presidency, the vice president assumes the role as 'interim president' until an election is held. The election should be held as soon as possible. A person is not elected to serve as an 'interim president.'

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(9/15/2016) Q: Our new president was told by our parish priest that he has the authority to shut us down if there were problems within our Conference. Can you give us some insight into this? I was under the assumption that only our District Council has that authority.

A: The parish priest does indeed have the authority at any point in time to tell the Conference to close and not operate in his parish. We are present in parishes at the invitation of the priest. However, priests do not have authority over the Conference operations.

(9/15/2016) Q: Is it permissible for a Vincentian and a non-Vincentian volunteer (spouse, friend, etc.) to conduct a home visit, or do both visitors need to be Vincentians?

A: If a volunteer accompanies an active member on a home visit, at a minimum, the volunteer is considered to be an associate member and, therefore, it is no problem for them to go on a home visit. It is also not an issue with liability insurance because the volunteer is acting on behalf of the Society as an associate member. This is also one way we get new members into the Society: by inviting others to come along and help out. This is an opportunity to show 'charity at work.' Also, we assume that the Vincentian who invited the volunteer is comfortable with that individual, and that whom they invited will act appropriately.

(9/22/2016) In response to reader feedback to last week's answer concerning non-Vincentian volunteers (spouse, friend, etc.) accompaniment on a home visit, Resolution 91 states: "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," including fingerprinting if required. Hence, the non-Vincentian must abide to this as well.

(9/22/2016) Q: If our Conference provides rental assistance to those whom we serve, do we need to get their SS# or EIN# for the landlord? What is the policy for this?

A: There is no need nor is there a policy stated for the Conference to obtain the SS# or EIN# of those whom we serve in order to pay their rent.

(09-29-2016) Q: After a home visit and interview has occurred, and the two Vincentians who visited make a recommendation, what is the rule on voting to honor that recommendation?

A: If a decision has been made by the Conference, all members have to honor it. Based on your description, it sounds like the home visiting team assesses the client's situation and presents their recommendation(s) to the membership body. Thus, the decision made by the Conference from the recommendation given must be honored.

(9-29-2016) Q: How should a Conference report gift card purchases or gift certificates for food on the annual report?

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A: Gift cards or gift certificates purchased by Conferences for food should be reported as "those we serve" since the expenditures are on behalf of clients in need.

(10/06/2016) Q: Can you help me explain the reason for the 60 day expiration on the release form that people we serve have to sign when we provide assistance to them?

A: The reason for the 60 day expiration on the release form is to assist us with gathering information. The form that we ask our friends to sign allows us to learn more about their needs. The form is designed to be used only for the purpose of assessing the assistance being requested at that specific time.

(10/13/2016) Q: Where do you report funds donated to the Haiti scholarships?

A: Haiti scholarship donations should be entered under "contributions to upper Councils" on the annual report forms.

(10/20/2016) _Q: What is national's official position on having co-presidents within a Conference? I cannot find anything in the Manual or the Rule that prohibits it.

A: The National Council's official stand is that co-presidents in a Conference are not recommended. Too many problems occur with co-presidencies, and it is difficult for Vincentian members to know who to go to for issues and/or concerns that may arise. This is the reason we have vice-presidents. One president per Conference is sufficient. However, if co-presidents in a Conference exist, it is at the discretion and guidance of the Diocesan Council.

(10/20/2016)_Q: Our newly elected Conference president has resigned. I was the former president. Since I was elected to the diocesan president position before I completed my term, can I assume the Conference position again? We do not have anyone who is interested in being the Conference president at this time. Can I take over as president or do we have to have a formal election?

A: There has to be a formal election for you to become president of the Conference again, only if you are eligible to be elected again. If you have already served two terms as Conference president, you will have to wait until you have been out of office for three years to be elected again.

(10/27/2016) Q: On programs such as the Thanksgiving Baskets giveaways, is it appropriate to use Society funds if parishioner donations are not sufficient?

A: The Thanksgiving Baskets outreach program does not violate any Rule or National Council guidelines. Assistance being provided to another parish is not a problem as long as the merchandise/food is being given away for free. Also, no accounting protocol is being violated for using Society funds if parishioner donations are not sufficient. Hence, it is indeed appropriate to use Society funds to purchase merchandise/food to give away to people in need at no charge.

(10/27/2016) Q: Are volunteers allowed to take food from the pantry they serve at?

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A: Volunteers should not take food from the pantry! Volunteers are not entitled to Conference resources unless specifically approved by the Conference in the same manner as assistance is provided to our friends in need.

(11/3/2016) Q: Does the Extension Committee have any material on communicating with clergy about SVDP? If so, how can we find it?

A: There is a wealth of extension materials on communicating with clergy about SVdP on the website. Here is the link: <http://www.svdpusa.org/svdextension/>.

(11/3/2016) Q: I have a store committee that wants to do a fund raiser in the community, so they can have a Christmas party for employees and volunteers. Is this against the *Rule* or any standards?

A: As long as the community knows that the fundraising event is for a Christmas party for employees and volunteers, it is okay to do so. Funds should not be collected for another purpose and then used for a Christmas party. We must be very careful with this because then it looks like SVdP is collecting money to serve ourselves (employees and volunteers). No fundraising is acceptable under false pretenses. As always, use your best judgment.

(11/10/2016) Q: The annual report section on incorporation has a check box with the following statement: "This box should be checked if this entity does not have its own 501(c)(3) and is not covered by the national 501(c)(3) tax exemption program, nor by another SVdP entity's tax exemption ruling."

We are part of the National Group's 501(c) (3) tax exemption. Should we check this box or leave it blank?

A: If you are part of the National Group's 501 (c)(3) tax exemption, you should NOT check the box. In some instances, there are parish Conferences still using the (church) USCCB's group exemption without authorization. Hence, the annual report form does not provide an option to recognize the legitimacy of being a part of the church because Conferences are not supposed to use the church tax exemption.

(11/10/2016) Q: Should Conferences use "Charity Check" as a record keeping system for SVdP visits?

A: The challenge with Charity Check is that the information on our friends in need is retained in their system forever for use by lots of different organizations. However, the general release form that we request our friends to sign is to gather information on their current needs, and is used only for a specific time period. It is not to maintain permanent record-keeping as is the case with Charity Check.

(11/17/2016) Q: Where can one find information on the installation of Conference officers?

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A: The installation of Conference officers' procedures/prayers can be found on the website under the Spirituality/Formation program/tools. Here is the link:
<http://www.svdpusa.org/members/Programs-Tools/Tools/Spirituality-Formation>.

(11/17/2016) Q: When can active and associate members who no longer participate in Conference activities be removed from the membership roster? Can they be removed if they have not been to a meeting or done any active work with the Society for more than a year? Does the member have to submit a letter of resignation before we can take them off the membership list?

A: A letter of resignation has never been required unless it is one of the officers and then it is optional. Removal based on inactivity for a period of time (like a year) seems reasonable, as long as it is brought to the membership for a consensus or vote.

(12/1/2016) Q: Can a former president who once served six years for a Conference now closed become president of an active Conference in another parish?

A: Yes, as long as the members of that Conference accept him or her as a member. As president, he or she must actively participate in the Conference life by attending meetings and performing Conference works of charity.

(12/1/2016) Q: Can paid staff executive directors be members of a board? Can they be officers of a board, such as a store board?

A: Executive directors can be non-voting members of any board of directors. Paid staff cannot be officers at any level in the Society.

(12/8/2016) Q: Where can you find information on the installation of Conference officers?

A: The procedures/prayers for the installation of Conference officers can be found beginning on page 58 of Vincentian Celebrations - Rituals and Ceremonies.

(12/8/2016) Q: Can a member once incarcerated for identity theft be permitted to rejoin the Conference?

A: It is understandable for Vincentians to want to be forgiving and accepting. It is also clear that Vincentians present to those we serve an image of people who can be trusted. Many of those we serve are very vulnerable. This is similar to (not the same as) the conditions set forth for the "Safe Environment Program" where registered sex offenders cannot be members.

(12/15/2016) Q: Has the Society published anything regarding harassment for SVdP thrift store employees?

A: In the Stores Operations Manual, starting on page 110, there is a section under employee relations regarding harassment.

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(12/15/2016) Q: The District Council bylaws state that the Council president appoints members of the board of directors and officers. Does this include appointment of a president for the board of directors or does the Council president serve as president for both groups?

A: The president and officers of the District Council are also the president and officers of the board.

(12/22/2016) Q: Can the "advisors" on an advisory committee vote on advisory committee issues?

A: Yes, the committee can vote on matters concerning the committee. Any matters/recommendations presented to the board must be approved by the board members who are eligible to vote before the recommendation can be passed on to the Vincentians in the Council at large.

(12/22/2016) Q: Is it okay for a Conference to help a family on a monthly basis with rent?

A: There is no problem with helping the same family each month with rent, unless there is some ulterior motive-like the family being related to a Conference member. If all members are in agreement to do so, it is not against policy or the Rule.

(1/5/2017) Q: Are two members of the same family (such as husband and wife) allowed to serve as officers in a Conference?

A: In the Rule, Part III, Statute 12, the last sentence reads: "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."

(1/5/2017) Q: Does a family receiving long-term assistance from a Conference have to report it as income on their taxes?

A: No. SVdP does not provide IRS forms to those whom we serve for tax reporting purpose, so there is no income filing required.

(1/12/2017) Q: Can donations received by a Conference for work with the poor be used as a gift to the parish priest?

A: There is no National policy that allows SVdP funds to be used to give a gift to a priest. Conference members may take up a personal collection for this purpose, but those funds should not be comingled with Conference funds. The Rule, Part I, Article 3.14, states that Vincentians should never forget that giving love, talents and time are more important than giving money. The Society uses money and property to help relieve the suffering of those in need. The Society's funds must be handled with the utmost care, prudence and generosity. Money must not be hoarded. Decisions regarding the use of money and property are to be made after reflection in the light of the Gospel and Vincentian principles. Accurate records must be kept of all money received or spent. The

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Society may not allot funds to other organizations, except occasionally for other branches of the Vincentian Family, save under exceptional circumstances.

(1/12/2017) Q: How much information on those whom we serve are we permitted to share with other organizations? Can we share our home visit reports?

A: Confidentiality is extremely important in the Society. It is a violation to share information of those whom we serve with other organizations, unless you received authorization from those whom you serve in the form of a written and signed waiver. Samples of waivers can be found on the National SVdP website.

(1/19/2017) Q: We have completed the required security screening for all of our Conference members. Are we required to report that to national?

A: The security screening is a diocese's requirement not national. Therefore, the information should be retained by the Council.

(1/19/2017) Q: Can a husband and wife belong to the same Conference?

A: Husbands and wives can indeed belong to the same Conference. This is not against the Rule. As Vincentians, we are encouraged to increase membership by extending an invitation to all of our family members to join.

(01/26/2017) Q: I prefer to take minutes differently than shown on the form offered in the minutes' book. We follow "Robert's Rules." Is it essential that I use your form?

A: It is not necessary to use the form provided in the Secretary's Minutes Book as long as appropriate minutes are taken. Minutes can be taken in any format.

(01/26/2017) Q: Is there a National SVdP rule that members of a new Conference who have completed the Ozanam Orientation must be accompanied by a member of another established Conference on every home visit made for six months?

A: This is not a national requirement; however, what you describe is a local definition. Councils/Conferences throughout the country probably have their own restrictions on home visit training

(2/2/2017) Q: I've noticed the tendency to "hang on to money" both in my former Conference and the Conference I am a member of now. Each treasurer announces proudly the significant account balances while some of our poor are receiving little more than food cards. Is this a common practice?

A: It is not permitted for Conferences to hoard money. Secondly, if this is occurring in Conferences you are aware of; it needs to be brought to the attention of the SVdP leaders in your District Council and to the Regional VP to determine how to resolve this issue. This is not what members are supposed to do with donated resources. Donations to Conference are meant to address today's

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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).

(2/2/2017) Q: We have a member who does a lot of travel as a representative for national. Does the Conference record these miles on the national annual report?

A: Typically, mileage counted is for home visits and other works being done in the immediate area. However, it won't hurt to include members travelling as national representatives in the same place as mileage for home visits and other Society work on the Conference annual report.

(2/9/2017) Q: Now that our Conference has its own 501(c)3 tax exemption, are we required to document and submit our Conference rules to the federal and local governments?

A: The National Council is not aware of any need to send the copies of our rules and guidelines to government organizations.

(2/9/2017) Q: Can our Conference change in "The Rule" the two person home visit to read that we cannot visit a close friend and that other members should do so to avoid any conflict of interest?

A: Every Conference is expected to follow The Rule, Nationally Approved Bylaws for Conferences and the Manual. In addition, the Conferences are expected to have their own set of guidelines for how they will operate locally. There can be nothing in the Conference Guidelines that contradicts The Rule, Bylaws, Manual or spirit of the Society. The guidelines should be in writing, approved by the Conference as a whole, and distributed to the members.

On the National website, you will find the document "Vincentian Life: Conference." Within this document is quite a bit of information on establishing guidelines and what makes Vincentian sense related to the various services we provide. There is also plenty of explanation related to why we do things the way we prescribe. "We cannot visit a close friend and that other members should do so" is a very good practice to be followed. Click here <https://members.ssvpusa.org/leadership/>, to view the document under the tab "Basics About Conferences."

(2/16/2017) Q: Is it against the Rule to give someone in need a ride? If not, are Conference members who do so liable if an injury occurs?

A: It is not against the Rule; however, two Vincentians must be present and the Vincentian (driver) giving the ride should be licensed and insured.

(2/23/2017) Q: Can a Conference provide college tuition scholarship assistance to a student in need?

A: College tuition scholarships should be given based on three basic and minimum considerations:

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1. The scholarship would be for a student from a family living in poverty, usually a family that has been served by the Conference,
2. The student would not otherwise be able to attend college, and
3. The academic level of the student warrants this consideration.

(2/23/2017) Q: Can a lawyer subpoena one of our SVdP members on behalf of a neighbor we once served?

A: It has been the practice of SVdP to honor subpoenas related to the Society and its work. For example, if a Conference receives a subpoena to reveal all of its records associated with a given person who it helped, the legal document (subpoena) would override our rules of confidentiality. If the member is being subpoenaed to testify related to his/her work within the Society, then that member should honor the subpoena.

(03/02/2017) Q: Does an active or associate member, who has not been to a meeting or done any active work with the Society for more than a year, have to write a letter of resignation before they can be removed from the membership roster?

A: A letter of resignation has never been required unless it is one of the officers, and then it is optional. Removal based on being inactive for a period of time (like a year) seems reasonable, as long as it is brought to the membership for a consensus or vote.

(03/02/2017) Q: As part of their duties, are district presidents expected to reach out to parishes without Conferences to start new ones?

A: All members, especially those who serve in leadership roles, should engage in the development of new Conferences and of members. No member is exempt from inviting new parishes and people to join SVdP

(3/9/2017) Q: Can an individual be hired for part-time work to report directly to the president of the Conference, whose wife is the manager of our thrift store?

A: Employing spouses is a conflict of interest and should be avoided at all times. Also, there should never be two bosses over the same facility. The store manager should have authority over all employees.

(3/9/2017) Q: If there is a tie in an election for president, who would be the tie breaker if the current president is running for re-election?

A: The president is normally the tie breaker. If the president is a candidate, a tie-break process must be established (by the nominating committee) before the election takes place to ensure the election is completed properly. If the election has already taken place (ending in a tie) and no tie-break process was established, then a tie-break process must be established and the voting must be redone.

(3/16/2017) Q: We had a reporter contact us about whether or not the Society helps people pay their medical bills.

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A: One-time medical co-pay assistance is not an issue. Medical bills are generally for substantial amounts far exceeding financial resources of Conferences. Hence, strong consideration by Conferences, with all members in agreement, is needed to assist with medical bills. It is possible that a one-time payment contribution for a portion towards the total medical bill could occur.

(3/16/2017) Q: All Conferences submit financials for transparency and oversight on the part of the Council. What authority do Councils have to request such information?

A: According to 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/her Council, may "require" annual audits of all Councils and Conferences under his/her jurisdiction.

(3/30/2017) Q: Do Conferences have to retain/track 'detail' with regards to member hours? For example, meetings, delivering food, home visits, working on Council programs, etc.

A: Detailing volunteer hours is helpful for annual reporting although not required. Details are important in categorizing the type of volunteer service and time provided.

(4/6/2017) Q: Is it against the Rule for a vice president to also serve as treasurer?

A: 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.

(4/6/2017) Q: For a Conference that is closing, can the money left in the account be put in the general Council fund for Conferences, or does it need to go specifically to the Conferences that are absorbing the service area of the Conference that is closing?

A: The intent for the use of funds from a Conference that has closed is to use the money collected to help the poor in that particular area where the Conference once existed. The District Council needs to make every effort to serve families in that area using the resources of the closed Conference. If other Conferences are serving the area, then the Council should specifically reimburse that Conference or Conferences individually, and per client case, based on their assistance to families in that area. They should not be given the money upfront. Every effort should be made to use the resources of a closed Conference collected for families in the community in which it was originally donated.

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(4/13/2017) Q: We added a room to our pantry and our president who is a carpenter by trade with the help of other members was paid to build it. The total price of the project was lower than the cost of a hired contractor. Is this ok under the bylaws of SVdP?

A: It is okay for Conferences to pay the president or any other member to do a particular thing for a short term job as long as all members know and are in agreement with the terms. This could become a problem if it is happening consistently, and the Conference must be aware of any conflicts of interest. It can also be a problem if the president or other officers are paid on a consistent basis for doing regular jobs, they would lose their eligibility to hold office.

(4/13/2017) Q: The solidarity contribution assessment for stores is based on their total revenue (normally total sales), and not on their profits (sales minus expenses). Correct?

A: Yes, on the Stores Report there is a line item titled "Total Revenue" (not "Total All Store Income") that is used to determine the solidarity assessment for a store. Expenses do not come into play in the solidarity calculation.

(4/20/2017) Q: Could you please share with me what national has for their "Global Ends" policy?

A: [Click here](#) to view the National Council SVdP Ends Policy document; Spirituality, Friendship & Service

(4/20/2017) Q: Is it acceptable for Conference members to send money to a priest in India for his use in supporting an orphanage in his parish district?

A: According to the Rule Part III Statue 26, this is not allowed. 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.

(04/27/2017) Q: I recently discovered one of my longtime members has been a registered sex offender. Am I to tell him he can no longer continue as a member? Is there any rule or direction in this matter?

A: 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, however, our Rule prohibits discrimination if they are in need of help.

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 compliance." The requirements may vary from one

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diocese to another. For example, if background checks and fingerprinting are a requirement of your diocese or parish, then you are obligated to comply.

(04/27/2017) Q: Can a Conference have paid staff?

A: Conferences can hire paid staff for a thrift store or a special work. Paid staff should not be hired to perform Conference works. Sometimes Conferences want to hire someone to do their bookkeeping; this is permissible, but that person cannot be an officer. The Conference would still need a treasurer and a secretary if the "bookkeeper" was also doing some of the secretarial duties.

For instance, friends in need interviews and providing assistance should be performed by two members of the Conference - not by paid staff. It is part of our ministry and responsibility as Vincentians. The purpose for paid staff in thrift stores and other special works is to help members do their work - not do it for them.

(5/4/2017) Q: Where does the Council get its support?

A: According to the Rule, Part III, Statute 24, "The authority to manage the Society's assets remains exclusively with the Councils ... " This statute goes on to say, "Councils may determine annually the percentage of the funds of each Council or Conference within their area that may be made available to them ... "

Chapter 2 of the Manual, page 26, subheading 'Funds of the Conference' states, "Conference members should never adopt the attitude that the money is theirs ... " In addition, under 'Donation of Conferences' it reads, "Surplus funds should be shared generously with needier Conferences or the special works of the District."

(5/4/2017) Q: I know a priest or nun cannot be an officer of a Conference, however, can a deacon be president, vice president, secretary or treasurer?

A: A member of the ordained clergy, i.e., a priest or a deacon, is not eligible to be elected or appointed in the Society to any office outside their spiritual role (Rule Statute 15). Only lay persons are eligible to be officers; nuns are professed/vowed (not ordained) and considered to be lay persons, and can indeed hold office.

(5/11/2017) Q: Where do families experiencing hardship go for help?

A: Anyone who comes to us for assistance is in a hardship in some way. Hence, persons experiencing hardships can contact the local SVdP parish Conference for help.

(5/11/2017) Q: Can Conferences have members who are not parishioners?

A: Non-parishioners can indeed be members. However, only Catholics can be considered "active" or "full" members. Non-Catholics are considered "associate" members.

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(5/18/2017) Q: Where on the national website can information on guidelines for termination of an employee be found?

A: The Employee Termination Checklist document can be found under "Governance Initiatives" on the Governance in a Box Web page. [Click here](#) for quick reference. In addition, bylaws have a section related to the termination of an executive director/chief executive officer.

(5/18/2017) Q: Can associate members go on home visits with a full-time member?

A: Associate members can go on home visits and represent the Society properly along with an active/full member. If an associate member is allowed to go on home visits it means that the Conference has confidence in their judgment. An associate member in whom the Conference lacks confidence in their judgment should not go along on a home visit just to fulfill the two Vincentians rule.

(5/25/2017) Q: Is it okay for a Conference to assist their own parishioners who do not reside within the parish boundaries? We have registered parishioners who reside within the boundaries of our neighboring SVdP parish Conference, who are requesting assistance from us, the parish where they are registered.

A: It is not a problem assisting parishioners who reside in a neighboring parish Conference boundary and attend the parish they are seeking assistance from. You don't want parishioners turned down or refused help on a technicality. We want to maintain a good relationship within the parish and with the priest. It would be beneficial to inform the neighboring Conference of the fact that you are helping someone in their area.

(5/25/2017) Q: Our Conference has opted to donate \$100 a month to the National Disaster Fund rather than to donate to individual disasters. This happens to equal one of our local yearly fundraisers. Is this a viable option?

A: When speaking about national disasters, SVdP contributions may only be made to SVdP in the disaster area. These donations may come from the normal Conference funds because it would effectively be like Twinning. Contributing to the National Disaster Fund on a regular basis works just as well.

It is important for our donors to always donate directly to the National Disaster Fund. This allows for planning and allocating for disasters as they occur throughout the country. The best way to support SVdP efforts in disaster recovery is to contribute to the National Disaster Fund.

(6/1/2017) Q: Is the Society okay with Conferences using their Archdiocese parishes revolving accounts (PRF) instead of savings accounts?

A: Yes PRF accounts are acceptable if they are not comingled with parish funds and as long as SVdP has access to the funds and no one else except the Conference and the funds are accessible immediately.

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(6/1/2017) Q: If the church parking lot or drive needs to be paved, do we need to have a special fundraiser or request a special donation or can it be covered by our regular funds?

A: The Society is not supposed to give funds to outside organizations (including the church). We are not supposed to do fundraising activity for outside organizations either. The best way to fund paving for a Society-owned parking lot is through special fundraising activity. Individual members may contribute personally to the church fundraiser but not as SVdP.

(6/8/2017) Q: What are the consequences if a Conference refuses to make home visits?

A: No consequences are imposed. However, as Council leaders we must continue to encourage and advocate the fact that home visits are what makes us unique and unlike other charitable organizations. The Rule, Part III, Statute 8 clearly states: "Visits to those in need should be made in their environment."

(6/8/2017) Q: Can a Conference organize around the ethnicity of its members?

A: No Conference should organize around ethnicity; this would be discrimination and is against our Rule. All should be welcomed to join and become members. According to the Rule, 7.7 striving to change attitudes, Vincentians oppose discrimination of all kinds and work to change the attitudes of those who view the weak or those who are different with prejudice, fear or scorn, attitudes which gravely wound the dignity of others.

(6/15/2017) Q: Can a paid employee vote in SVdP elections?

A: The answer can be found in the Rule Part III Statute 14. As the statute states, "employees of the Society ... may serve in a Conference other than holding any office. Paid staff cannot be officers at any level in the Society; however, paid staff who are active members of a Conference may vote on all issues (including elections) except those which may affect their jobs."

(6/15/2017) Q: Our Conference purchases basic dental hygiene products to provide to our local free dental clinic for patients. Is this against the Rule?

A: A Conference may, if it so chooses, purchase basic dental hygiene products and give to the local free dental clinic to be handed out to patients. This is only valid if the clinic gives the items to those in need at no cost. A consensus of the members must be in agreement also.

(6/22/2017) Q: Should members of the Conference be permitted to perform services for which they are compensated by a neighbor who is being helped by the Conference?

A: Members of the Society should not accept compensation from those we serve for the works that we do as Vincentians. What we provide in the way of resources and our time is a gift to those in need. No payment is to be accepted.

(6/22/2017) Q: What is our Rule on supporting other organizations? Is it a violation to attend other organizations annual benefits using SVdP resources?

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A: This falls into the category of attending meetings that are meaningful to the Society. It is not considered a donation being made but as the cost of attendance.

(6/29/2017) Q: Our Conference is assisting a neighbor who has someone once a week to help with laundry and housework. The helper is paid \$22/hour. The neighbor is not happy with the job this person is doing and would like to find someone else to do the work. Discussing the situation at our Conference meeting, one of our members offered to help this neighbor. The member wants to be paid for her services. Is this something that is permitted within the Conference?

A: If the member continues to receive payment for services from the person served by the Conference, then the member must withdraw from participating in any way with the Conference granting assistance to that person.

(6/29/2017) Q: Can a person join more than one Conference?

A: A Vincentian can hold membership at two Conferences. No additional info is needed for either Conference to be made aware of however, the member should disclose this information to both. There is nothing written, we must therefore go by the Rule and what it says an active member is, and although allowed, it's not often that one person is a member of more than one Conference so duplication of numbers is not significant.

(7/6/2017) Q: Does the Rule allow two members to serve as Conference Co-Treasurers?

A: The Rule requires a treasurer. The treasurer can have assistants who do various aspects of what is required. One person must be the responsible person for the position.

(7/6/2017) Q: When the National Council provides updated bylaws, is there anything required of a Council or Conference before effectively accepting the updates?

A: Conferences and Councils should read and discuss the changes before accepting them. If they have their own written bylaws that may be slightly different from (but in compliance with) the Nationally Approved Bylaws, then they should make the appropriate changes to their bylaws.

(7/13/2017) Q: Recently, it was stated that "twinning" was officially defined by the Society as: an arrangement between Conferences; A: to send a specific amount of money each month to Conference; B: which has need of additional income on a regular basis. Is this correct? If so, what do we call any help one Conference provides another Conference for a client on a one time basis?

A: The specific definition you gave is reasonable; however, it is not limited to monthly contributions. Really, it qualifies for anytime one Conference or Council sends money to another Conference or Council to help the Conference do its works. For example, if you send \$500 to another Conference to help them in whatever way they determine, that is twinning. In the case of giving money to another Conference to help in a particular case, that would qualify as aid for a

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friend in need (a co-pay) because you are helping an individual even though it is through another Conference. In this case, it would be appropriate for you to have a case record for the person or family helped.

(7/13/2017) Q: We are an agency of Second Harvest. We have held two mobile pantries, one serving 250 families and the other 200. Is this a figure we need to put in our "in-kind food" column? We also give out food every third Thursday that is provided by Second Harvest. We average 35 families. We have just started this a few months ago. Please advise if/how we would report this on the Annual Report. Not sure if I could be accurate on the value.

A: Unless you have a special arrangement with Second Harvest, the food you get from Second Harvest is purchased, so it is not in-kind. When you say that you "also give out food every third Thursday that is provided by Second Harvest," do you mean that Second Harvest is doing the distribution and you are helping, or that Second Harvest gives you the food free of charge and you are distributing? If it is the first, then you don't record anything except your time. If it is the second, then you record the food distributed as in-kind.

(7/20/2017) Q: At a recent multi-Conference gathering, someone suggested that if someone in need requests assistance more than once, the individual will be asked to perform some sort of "community service" in order to be served beyond the initial time. This service might include stocking shelves at a local food bank, tending a community garden, or some other similar task. Is this in keeping with either the spirit or the letter of the Vincentian Rule?

A: The works of the Society have always been in imitation of Jesus. The assistance provided by Jesus was unconditional. He did not require those He helped to do anything in order to receive His assistance. "Systemic Change" calls for us to work on systems toward helping those in poverty to move out of poverty, to reduce or eliminate rules and systems that keep people buried in poverty, to change systems - not to impose more of a burden on those we serve. Once you require someone to do work in order to receive something in return (food, clothing, furniture, rent payment, utility bill payment, etc.), it falls into the realm of an employer-employee relationship and then there are laws that have to be followed in that respect. What you are describing is not something the Society endorses.

(7/20/2017) Q: 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 very highest, which award next, etc.? Also, is there someplace I could find this defined?

A: 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.

(7/27/2017) Q: 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?

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A: 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.

(7/27/2017) Q: 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.

A: 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."

(8/17/2017) Q: 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 members so as not to lose the donation from their company. Your thoughts?

A: 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.

(8/17/2017) Q: 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?

A: 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.

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(9/7/2017) Q: 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 around xxx or should we also include contributing members which would bring up our numbers of "total" members to approximately xxxx?

A: 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.

(9/21/2017) Q: 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.

A: 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.

(10/5/2017) Q: One of our Conferences noted that in the SVdP Manual on page 10 (second to last paragraph), there is mention of "obtaining plenary indulgences on the day of their admission to the Society..." We were wondering if there is a special SVdP ceremony that will suitably achieve the granting of the indulgence on the participants. I could not find anything in the "Vincentian Celebrations" manual. We are looking for an official description of such a ceremony that would result in the granting of the indulgences.

A: There are no ceremonies associated with indulgences. You fulfill the requirements of the indulgences and they are granted - not by us, but by God. The requirements are specified in that paragraph in the Manual.

(10/5/2017) Q: At our National Council there are about 118 votes that could be cast. Do you know approximately how many votes can be cast at our General Council in Paris?

A: In the U.S., there are 124 National Council Members eligible to vote at Midyear and National assembly business meetings.

According to The Rule, Part II, the presidents of all instituted Superior (National) Councils or Assimilated Councils are voting members of the international Confederation. Assimilated Councils are lower level Councils or Conferences that have been officially designated as representing the country they are located in. We are located in 150 countries and potentially have 150 voting

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members. As is the case in the United States with our National Council members, even though 118 are eligible to vote, they don't always attend the meetings because of various reasons.

(10/12/2017) Q: 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.)

A: 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. St. Vincent de Paul and Blessed Frederic Ozanam may be used only if that is the name of the parish.

(10/19/2017) Q: 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?

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

(10/27/2017) Q: Does the Society have a policy related to investments that is based on moral objectives?

A: On April 23, 2016, the National Council approved Resolution 140 which identifies the criteria/process to be used in accepting donations and developing relationships. This also applies to making investments. This resolution may be found on the national website under Governance-in-a-Box.

(10/27/2017) Q: Do you keep a formal list of each individual contributing donor?

A: 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.

(11/2/2017) Q: 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?

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A: The instructions on the form state: 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.

(11/2/2017) Q: If something is not explicitly stated in the Rule, are we to assume we can use our good judgment to resolve the question?

A: Part II of The Rule, Article 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. We have the "Rule." We also have the Manual, bylaws, 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.

(11/09/2017) Q: On the new and improved 2017 Conference Annual Report, where do you report telephone contacts made to serve others?

A: On the 2017 Conference Annual Report, phone contacts should be reported under 'Other In-Person Visits' which includes any personal contact that is other than a home visit: pantry, parish office, special work location, gas station, restaurant, and any other place other than the home where we would meet someone in need. This would also include telephone contact since we no longer capture that separately. These instructions can be found on page 7 item E of the hard copy form.

(11/16/2017) Q: The new 2017 Annual Report form does not include "Telephone" contacts - only "In-Person" visits. Where do you report this important information?

A: In the instructions on page 7 item E of the 2017 Conference Annual Report phone contacts should be reported under 'Other In-Person Visits' which includes any personal contacts other than a home visit. This includes visits made at a pantry, parish office, special works location, gas station, restaurant, and any other place other than the home where we would meet someone in need. This would also include telephone contact since we no longer capture that separately.

(11/16/2017) Q: Our Conference prepares bagged lunches with both donated (in-kind) and Conference purchased food, and donates them to a local free health clinic. Our concern is that Conference members are not there handing out each of the lunches individually. Is this a violation of any SVdP rule or intent?

A: This is not a violation as long as we are sure that the bagged lunches are given free to those in need. We recommend that Vincentians occasionally participate in the distribution so they meet the people in need.

(11/22/2017) Q: There is discussion going on in our Conference about where the checkbook should be kept. What is the written policy on this?

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A: Please refer to the treasurer's handbook, particularly chapters 1 & 2. The treasurer should be the keeper of the checkbook.

[Click here to view or download a copy of the Treasurer/Secretary Handbook.](#)

[To order online click here.](#)

(11/22/2017) Q: On the 2017 Conference annual report under in kind goods and services it asks for number of services for in-kind goods (food , furniture, etc....). What number are you looking for here, it used to be number of people?

A: The "In-Kind Service and Goods" section of the report is strictly to provide stats on the 'number of times' service and the "number of times' goods were provided (or given). It is for tangible service and goods provided and not to account for the people we serve; which is to be entered under, "Visits and Service to People. "Remember, it is the number of times goods are given, not the number of goods.

(11/30/2017) Q: Someone wants to donate four burial plots to our Conference but the plots are not in a Catholic cemetery. Can we accept them?

A: Yes we can indeed accept non-Catholic burial plot donations for our service to those in need to assist with funeral arrangements and burial plots.

(11/30/2017) Q: On the new 2017 Conference Annual Report form, where do you record the hours of service members give to hospice and the sewing of vestments for priests in Africa?

A: The hours of service for hospice should be reported under Eldercare Visits, Person-to-Person Visits; and the priest vestments sewing under other "In Kind" Services.

(12/7/2017) Q: When soliciting funds from various sources, who in the SVdP chain of command is authorized to sign contracts? Should a copy of this contract be filed with District Council or Archdiocesan Council?

A: It is the holder of the EIN (District or (Arch)Diocesan Council) that should authorize contracts. The owner of the EIN can authorize a specific person(s) such as the president and/or executive director to sign on behalf of the Council. A copy of the contract should be filed with the EIN Council owner. Your bylaws should also reflect signatory authority by person and amount limits.

(12/7/2017) Q: What is the proper way to answer IRS Form 1023 questions regarding advocacy (Part VIII 2a & 2b); particularly in light of the Voice of the Poor and Capwiz activities?

A: The response for both questions is "No." The IRS is looking for major lobbying activities and related expenses. It also wants to identify which nonprofits are essentially advocacy organizations. While VOP communicates Society views to elected officials etc., our Conferences and Councils do

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not engage in typical lobbying activities such as paid lobbyists, gifts, etc. All of our related expenses are also a very small part of our total expenses for our organizations in the care of the poor. While "substantial" may not be well defined we are certainly below this bar.

(12/14/2017) Q: Can you cite how often Councils (not Conferences) are to meet? I can't seem to locate this information in "The Rule."

A: District Council meeting frequencies may be determined based on the criteria described in Article 13, page 129 of the National Bylaws.

(12/21/2017) Q: Does the Society have a records retention policy to follow?

A: 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 number 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.

(12/21/2017) Q: Is there any prohibition or policy regarding the use of gift cards by a Conference in our work in assisting our neighbors in need?

A: Many Conferences use gift cards to help those in need. Gift Cards can be used to assist with food purchases and personal hygiene needs. However, many cards can also be used for non-food items such as alcohol. Some cards can be sold by the recipient in the informal market for cash. For these reasons some SVdP Councils do not use them, while others have strict policies on types of cards and uses. Retailers may have special cards or vouchers that are limited to identified users and restricted by type of purchase. Assistance associated with utility payments, rent and other monthly living expenses billed to those in need should be paid to the third party with the Conference checking account.

(1/4/2018) Q: How should funds from a closed Conference be used?

A: The intent for the use of funds from a Conference that has closed is to use the money collected to help the poor in that particular area where the Conference once existed. Upon closure all funds are directed to the next highest Council; they are not to be transferred to the parish or diocese. The District Council should make every effort to serve families in that area using the resources of the closed Conference. If other Conferences are serving the area, then the Council should specifically reimburse that Conference or Conferences individually, and per neighbor in need case, based on their assistance to families in that area. Conferences who step up to serve those in the closed Conference community should not be given the money upfront. Every effort should be made to use the resources of a closed Conference collected for families in the community in which it was originally donated.

(1/4/2018) Q: Is there an electronic copy of the Rule and Manual available online?

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A: Yes, click here <http://www.svdpusa.org/members/Documents/Governance-in-A-Box> and scroll down to The Rule and Manual where you can click and download a copy.

(1/11/2018) Q: A SVdP active member has asked that our Conference help a seminarian in need. I know we should not send him money, but can we pay for books or help pay some of his tuition? We have sufficient funds to help.

A: Assistance to a seminarian would have to be treated as any other case - home visit, then help in the same way we would help others. There are no other guidelines to provide.

(1/11/2018) Q: We have a parish in our diocese that is giving money to another parish's SVdP Conference to do the work of SVdP Society for them. Is this in keeping with the Rule? Spirit of the Society?

A: It is not uncommon for two or more parishes to support a single Conference and the one Conference takes care of our neighbors in need in multiple parishes. We strive for each parish having its own SVdP but that does not always work out.

(1/18/2018) Q: What is the procedure for assisting a client out of our Council's area? Is it handled through the Council or Conference? Can we pay directly to a landlord in another area or do we need to work with the SVdP Council office in the other county?

A: Assistance should be provided to our friends in need in the community in which the parish Conference is located. Hence the individual should be given a referral to the Conference/Council where they reside. In good faith, the Conference/Council should be notified of the individual's need. If however, your Conference wants to help the neighboring Conference/Council with a twinning donation to assist the individual that can occur so long as all members are in agreement.

(1/18/2018) Q: We recently put a bulletin notice under our SVdP logo asking for a lawn mower and electric dryer for a family in need. The question was raised if there is a liability risk in doing these types of requests.

A: There can be a liability even if the equipment is tested properly before giving it to the person in need and he/she gets injured by the equipment. The recipient should always be informed that they must accept such goods "as is" since there is no warranty or guarantee. We recommend this be in writing. This advice also applied to thrift stores offering equipment for resale.

(1/25/2018) Q: Can a Conference vote and elect to meet only once a month? If so, does this require an amendment to the bylaws and approval from the upper Council, diocese and region? Please clarify.

A: 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.

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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.

Hence, Conferences should meet at least twice a month and a vote less than this is invalid and should not be supported. The Council General International in Paris does not recognize any SVdP Conference that meets less than twice monthly as a member of the international SVdP Council and will not issue an international Letter of Aggregation certificate to a Conference that does not follow the Rule.

Keep in mind that members gathering first before doing home visits, or working in a food pantry, qualifies as a meeting if some spiritual development (prayer, reflection etc.) and friendship are present at this gathering. A meeting does not need to be conducted around a table!

(2/1/2018) Q: If a small group of members gather before or after their work for a spiritual reflection and a short time to visit, does that count as a Conference meeting? Do any of the officers have to be present? What about the spiritual advisor?

A: The objectives of the Society are growth in holiness, community, and service. The Conference meeting is one of the only times when all three come into play. That is why the meeting is so important. If a Conference meets before a service, etc., then it can still be considered a meeting if at least half of the active members are present, including officers. Three or four members of a larger Conference getting together does not make it a Conference meeting.

(2/1/2018) Q: We would like to have a social gathering, for example a dinner, for all our volunteers with hopes that some will be encouraged to become more active. Can we use SVdP money for the dinner?

A: 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. The far majority of Conference members must be in agreement to the decision to use Conference funds to subsidize the dinner or use funds for marketing/recruitment purposes. A fee can be charged to cover the costs, with SVdP funds covering for anyone who can't afford it.

(2/8/2018) Q: Does the name of the governing body for SVdP have to include the word Council.

A: The traditional standard form for naming Conferences and Councils is "Society of St. Vincent de Paul _____ Conference/Council;" which includes the name "Council." There may be

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slight variations on the second part of the name, such as "District Council of..." This format acknowledges the named organization (level) as part of the Society.

(2/8/2018) Q: When National provides updated bylaws is anything to be done by a Council or Conference before accepting them as being in effect?

A: Conferences and Councils should read and discuss the changes before accepting them. If they have their own written bylaws that may be slightly different from (but in compliance with) the Nationally Approved bylaws, then they should make the appropriate changes to their bylaws.

(2/15/2018) Q: Can Vincentians receive financial assistance from the Council or their Conference?

A: Every Conference should be willing to assist people in need even if that person is one of the members. The following special considerations should be made:

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. Conferences generally don't loan money, they give gifts to those in need. To avoid future complications, the member in need may have to withdraw from the Conference until the crisis is over.

(2/15/2018) Q: If a friend in need asks a Conference to verify the assistance they received to another organization, is there any issue legally with doing so?

A: Information about those we serve can be shared with others if a specific written and signed authorization is given by our friend in need, whom we've served.

(2/22/2018) Q: A Conference received stocks from a donor. The donor donated to the Conference, leaving the decision for its use up to the members to be sold as funds are needed. Some members wish to hold on to the stocks for future needs, other members disagree and want to cash in now. What does national recommend?

A: Donations are given to the Society to help people in need in the present, not in the future. Thus stocks should be sold right away and used for current needs. Holding onto stocks has the appearance of hoarding. We are servants, not stockbrokers! Cash out such gifts upon receipt and then utilize the resulting funds as you would other SVdP funds.

(2/22/2018) Q: Is it required by members to obtain a copy of a driver's license and proof of insurance before issuing a gasoline card to those in need? Is there any National policy or position statement on this?

A: This is a local decision. There are no national guidelines available. There are many Conferences that require seeing a driver's license and an insurance card, but again this is a local decision.

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(3/1/2018) Q: How do Council leaders report the hours they spent at a national meeting? Is it counted as 24 hours a day, eight hours in a given day or is it strictly based on the total number of hours actually present at meetings (including workshops, committee meetings, presentations, general session attendance, masses attended meals shared in a Vincentian group, etc.)?

A: It can be approached two ways. One, start with the first scheduled event for the day and run through the last event scheduled for the day. Sometimes this is eight hours sometimes 12. The second is to use the first method plus the time spent in "on-your-own" time if it is effectively in meetings with other Vincentians. 24 hours per day is unreasonable, but eight hours average per day works also.

(3/1/2018) Q: How do Council leaders report their mileage if they pay out of pocket airfare?

A: Mileage refers to driving mileage only, and should only reflect the amount actually driven.

(3/8/2018) Q: Can one person deliver food to another organization by himself or do we need to send two?

A: The two person rule must be followed. This is SVdP food still being given away and must be handled properly with accountability of our resources.

(03/15/2018) Q: What does the Rule say about an employee who has become romantically involved with a friend in need whom SVdP is serving? Is this ground for employee dismissal? Are there any guidelines to follow?

A: There is nothing in the Rule that prevents such relationships. Normal ethical behavior would call for the employee to withdraw from any dealings or decision making with regards to assisting any friend in need with whom the employee has a new or existing relationship.

(03/15/2018) Q: What are the guidelines for an internal audit?

A: Information on auditing can be found at:
<http://www.svdpsa.org/members/Documents/Council-Conference>. Scroll down and click on "Secretary/Treasurer Information" and then "Treasurer's manual." Under the "Treasurer Manual Samples" you will find the Master Form "H" on page 42 where the audit verification form is located.

03/22/2018 Q: The parents of the general manager of the Council thrift stores are very active Conference members. Are these members prohibited from ever running for Conference president due to a potential conflict of interest? Or could the member just recuse himself/herself from any board decisions that might affect store employees or policies?

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A: The parents would be eligible to run for Conference presidency. If elected, the conflict of interest would have to be declared to the board. The Conference president could recuse himself/herself from decisions related to the stores but the board should decide if this is appropriate depending on the nature of the business being voted on.

03/22/2018 Q: Our Conference reached out to the Council for financial assistance to help someone in need and the Council advised they could not help because the person in need contacted the Conference for assistance and NOT the Council. What is the purpose for having a Council?

A: The primary purpose for a Council to exist is to support the works of a Conference. If the Council has available funds, financial assistance to Conferences in need should be considered.

(3/29/2018 Q: Does the National Council SVdP post its IRS Form 990 return for public viewing?

A: Yes, the National Council's IRS Form 990 is posted on the national website at www.svdpusa.org/donate. It covers only the finances of the National Council.

(3/29/2018) Q: Since there is no entry on the new annual report, should I report District Council officers' mileage under one of the Conference annual reports?

A: Yes, District Council officers' mileage should be included with one of the Conference annual reports.

(04/05/2018) Q: One of our Conferences organizes a group of volunteers, some Vincentians and some not, to cook an evening meal once a month. Another Conference undertakes a "Christmas Giving Program" at its church whereby parishioners take a tag to donate a gift. The gifts are returned and the Conference delivers the gifts to a community agency who will distribute them to the needy. There is no Vincentian visit with the ultimate recipients. How are these reported on the Conference annual reports?

A: These can be considered Vincentian activities but only the hours of the members should be recorded, unless funds of the Conference are used to buy food or gifts then the expenditures can be recorded also.

(04/05/2018) Q: Under the "Total Hours of Service: Members," would you please clarify the instructions where it states to include the time members spend attending meetings?

A: All meetings attended by members should be counted as service hours with no distinction of the type of meeting attended.

(04/19/2018) Q: 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?

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

(04/19/2018) Q: 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.

A: 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.

(04/26/2018) Q: 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?

A: 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.

(5/3/2018) Q: I am struggling with a decision made by our Conference. I disagree with it. How do I deal with this?

A: 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.

(5/3/2018) Q: 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?

A: There is no conflict. Part I is the International Rule. Part III of the Rule is associated with the Society in the United States. This provision in the Rule Part I is there to allow the Society to function in countries where there are not many Christians and interdenominational cooperation is common. We consulted with the Episcopal Conference as required by the Rule and they made it clear through our Episcopal Advisor that they did not favor active members or officers being non-Catholics.

Below is the portion of the Rule being referenced that would allow such non-Catholic officers. Even in countries where it is permitted the Rule states that the person must be approved by the local bishop and be a member of a denomination that believed in the "real presence of Christ in the Eucharist, the seven Sacraments and devotion to Mary." There are not many denominations that fit this description and it would involve consulting with the local bishop for each candidate.

This provision in the Rule Part I is there to allow the Society to function in countries where there are not many Christians and interdenominational cooperation is common:

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- Rule Part I 6.4, Ecumenical and inter-faith membership. In some countries, circumstances may make it desirable to accept as members Christians of other confessions or people of other faiths who sincerely respect and accept the Society's identity and its principles insofar as differences of faith allow. The Episcopal Conference should be consulted.
- Rule Part I 6.5, Preserving the Catholic credo and ethos. The Catholic beliefs and ethos of the Society of St. Vincent de Paul must be preserved. The President, Vice-President and Spiritual Adviser should, therefore, be Roman Catholic. They may, in certain situations depending on national circumstances, and after consultation with the local diocesan Bishop, be members of churches and ecclesial communities which share the Catholic belief in, among other issues, the real presence of Christ in the Eucharist, the seven Sacraments and devotion to Mary.
- **(5/10/2018) Q: 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?**
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- **A:** 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.
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- 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.
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- 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.
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- **(5/10/2018) Q: A local dentist, who is the son of two of our Conference members has agreed to accept our pledges/payments to assist our "neighbors-in-need" with dental work. Is this a conflict-of-interest?**
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- **A:** It is not a conflict of interest, but the rest of the Conference members should be made aware of this. Payment amounts must be usual and customary; that is, no extra funds should be sent to this dentist than to any other providing the same services.

(5/17/2018) Q: I have been told that our pastor cannot be a signor on our account. Where does it say that?

A: 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

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signers on accounts, it is an example of our tradition. It is addressed on page 26 in the Manual under "Funds of the Conference."

(5/17/2018) Q: 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?

A: 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 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.

(5/24/2018) Q: 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?

A: 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. In this case the certificate can help the veteran to obtain employment.

(5/24/2018) Q: 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?

A: 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/travel 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.

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(5/31/2018) Q: 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?

A: The pastor has every right to ask SVdP to leave his parish, just like he has every right to invite us in. The way the question is stated, the pastor seems to be at fault since he is alienating more than SVdP; but we must be sure that we are not the ones causing the separation. The first thing to be done is to see if there is any way to keep the Conference alive and well. If someone in the Conference has a good relationship with the new pastor, then that person should contact the pastor to find out what the issues are and try to help resolve those issues. If that does not work, the following 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.

(05/31/2018) Q: 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.

A: It is an acceptable practice. The practice described above may help to draw others to the Society. The more our fellow parishioners know about the Society, the more they will support us. Also, experience has shown that not many of the people we serve read our parish bulletins.

However, many of our Conference members throughout the country believe our members should maintain a low profile. They believe that, as you make yourselves known, you open yourselves up to be contacted directly by those in need. There may or may not be validity to this thinking.

The response to this will vary throughout the country. As long as the Conference members are comfortable with this practice, it is acceptable.

(6/14/2018) Q: 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 form & pay by check. I know nobody can be forced to do anything, but it sounds counter-

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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 ???

A: 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, except that they are not anonymous gifts. When the Society was first founded, the secret collection was the basic funding for the Conference. Today, it is more of a symbolic gift (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.

(6/14/2018) Q: 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 vice president. 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?

A: 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 an independent lay organization, will it look like the cardinal is exerting control over the Society? Perception has a great deal of influence on people.

(6/21/2018) Q: We were recently approached by a woman and an underage companion, relationship unknown, they were homeless and asked for our help until they could get into a shelter in a nearby city. We put them up in a local hotel for a few nights, checked on information she had given us and found out she was a registered sex offender. What is our responsibility here?

A: 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.

(6/21/2018) Q: Is it necessary for home visitors to have background checks before they can do home visits?

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A: 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.

(6/28/2018) Q: Is there anything short of an appointment with a priest that we may consider "spiritual aid?"

A: "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."

(7/5/2018) Q: My Conference works with ServWare, client tracking software. The system has the capability to network all Conferences in my Council, allowing our members to have a fuller picture of the support the Society provides to a friend-in-need Council-wide.

I recently heard that ServWare can add non-SVdP charities that may be collaborating with the Society in our mission of helping those who struggle. This approach makes a lot of sense with limited resources to help people in need, but is it ok for us to share confidential information and names of those we serve with outside organizations?

A: Networking with like-minded organizations can be very helpful in the fight against poverty. The sharing of aggregated information, where no individual is identified, is not a problem. Before a friend-in-need's information can be shared with a non-SVdP charity, however, you must have a signed waiver from the person, granting permission to share confidential information with other community organizations.

ServWare and many other client tracking software programs can easily modify their software (usually free of charge), allowing you to automatically select only those friends-in-need with signed waivers when sharing information with a non-SVdP charity.

The recommendation is to secure the friend-in-need's written approval, with his/her signature and date, and to add the information into the profile in your client tracking software. ServWare and other like industries will modify the software to make sure this documentation is maintained. Be sure to retain the signed document either in a paper file, or electronically scanned into your client tracking software, such as ServWare, to ensure you will have the documentation required. Click here to view sample copy of 60-days expiration waiver, or click national website link:
<http://www.svdpusa.org/members/Documents/Council-Conference>.

(7/5/2018) Q: Can a deacon be employed as an executive director/CEO of a (Arch)Diocesan Council?

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A: Deacons can serve as executive director/CEO. In the Society, executive director/CEO is NOT an officer position. In addition, executive director/CEO is a NON-voting member of the Council/board. Therefore, deacons are eligible for the role.

(7/12/2018) Q: Is it ever appropriate (or legal?) for a Vincentian to use his/her home address instead of the Conference's legal address? For instance, receiving checks made payable to "Society of St. Vincent de Paul," but using a Vincentian's home address instead of the Conference's legal address.

A: As long as the check is clearly made payable to the SVdP Conference and no one else, the home mailing address is allowed.

(7/12/2018) Q: If our Conference hosts an ice cream social as a thank you to our parishioners for their donations throughout the year, can we purchase ice cream, syrups, soda for floats, paper bowls and plastic ware with our Conference funds?

A: This is something that would typically be paid for by Conference member's personal donations, utilizing donations given to serve the poor solely for that purpose.

(7/19/2018) Q: appropriate to use Conference funds to pay for dinners for monthly city-wide dinner meetings for Conferences held by the Council? Each Conference is asked to host a monthly meeting and pay for all the visitor's meals.

A: This is a legitimate Conference expense as part of its solidarity with the rest of the Society. However, many of the meals at these meetings are covered by a black bag collection during the meeting to cover the meal cost.

(7/19/2018) Q: 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.

A: The 5th Sunday collection is 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 5th Sunday collection for the Society.

(7/26/2018) Q: 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 three months) is it consistent with Society rules to end (deny) assistance after a specific period of time (say two years)?

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A: 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.

(7/26/2018) Q: 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?

A: 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, contact the National Council office. The Council General International will be notified.
- If you are going to create a Conference with a new name, a new aggregation application under the new name is required.
- If you are simply going to continue one of the Conferences with a name change, upon request the National Council Office will prepare a duplicate/name change aggregation certificate.

The existence of the prior Conferences will not be lost. Records are maintained both at National and International offices.

(8/2/2018) Q: Is a person that is not able to receive the Eucharist eligible to run for Conference president?

A: The Rule (Part I, 6.5) specifies a person must be Roman Catholic to be a president, vice president or spiritual Advisor. There is no specification as to what degree they are a practicing Catholic and that is too hard to determine. If the person qualifies as an active member, the Rule does not prohibit the person from running for president.

(8/2/2018) Q: We received a call today from a stepbrother who says his stepsister is misusing the Society by asking for assistance she doesn't need. He had details and examples. Is this something we should alert the Council/Conference about?

A: How she uses what she is given is for her to decide. However, if she is a regular recipient of the Conference benefits, then hopefully the Conference members will pick up on this during a future Home Visit and deal appropriately. Pray about it and do what you feel God is expecting you to do.

(8/9/2018) Q: As a Conference president, can my spouse serve on the board of directors as long as my spouse is not an officer?

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A: A president may appoint a spouse as a member of a formal board of directors - just not as a Conference officer.

(8/9/2018) Q: Our Conference would like some guidance on what content and details should be recorded in the meeting minutes. Are there guidelines or samples of minutes available for viewing?

A: On the national website the secretary's minute handbook can be downloaded. Here is the link: <http://www.svdpusa.org/members/Documents/Council-Conference>. Scroll down and click on Treasurer/Secretary Information to view the list of items in the category

(8/16/2018) Q: One of our Conferences would like to apply for a grant for sponsorship for the Friends of the Poor Walk. They have requested the annual report. Is it permissible to provide an annual report to an outside organization?

A: The Conference Annual Report, as designed by National, has summary information related to the finances and activities of the Conferences. There is no problem in sharing this information with other organizations. However, some of the items on the report may need explanation to someone not familiar with the Society and how it operates. Also, the annual reporting includes other reports such as stores and special works reports. Nonprofits with their own EIN must have an annual report to the public as a matter of law. This does not need to be the same report sent to the National Council; it can be much more of a summary of finances and activities. Most funders want to see a copy of the 990, which is considered to one form of official nonprofit report. 990s are open to all, just as the Conference Annual Report is open to all. Most organizations seeking information about SVdP are happy to receive summary information, rather than trying to analyze a report which may need interpretation.

(9/6/2018) Q: How do Council leaders report their mileage if they pay out of pocket airfare?

A: Mileage reporting on the annual report means driving mileage. Mileage should reflect only the amount actually driven in a vehicle.

(9/6/2018) Q: How do Councils leaders report the hours they spent at a national meeting? Is it counted as 24 hours a day, eight hours in a given day or is it strictly based on the total number of hours actually present at meetings (including workshops, committee meetings, presentations, general session attendance, Masses, attended meals shared in a Vincentian group, etc.)?

A: It can be approached two ways. One, start with the first scheduled event for the day and run through the last event scheduled for the day. Sometimes this is eight hours sometimes 12. The

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second is to use the first method plus the time spent in "on-your-own" time if it is effectively in meetings with other Vincentians. 24 hours per day is unreasonable, but eight hours average per day works also.

(9/13/2018) Q: What is the difference between twinning and co-pays?

A: There seems to be a basic misunderstanding of what twinning is. When it comes to SVdP use of funds, twinning is the process by which a Conference or Council gives money to another Conference or Council to use as the receiving entity sees 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 to use as needed. This is twinning. This would be recorded financially under category 8 (A or B) as domestic or international twinning.

A co-pay, on the other hand, 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 \$600 rent for John Smith's family of four but can only come up with \$300. So, Conference B asks Conference A for \$300 to help in this case. Conference A sends a check to Conference B for \$300 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. Conferences, however, 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." Rather, it 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.

(9/13/2018)Q: Can a Conference use some of their funds to promote an upcoming FamVin meeting in their Diocese?

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A: There is no problem in promoting other members of the Vincentian Family. Any Vincentian gathering will most likely inspire the attendees, help them grow in holiness, and better prepare them for serving those in need. Therefore, it is a valid expenditure.

(9/20/2018) Q: I have a question from the bylaws about committee chairs and whether they need to be a board member or not. Our bylaws are based off the model bylaws and here is where I see some inconsistency and need your guidance. There is nothing in the Rule or Manual on this topic. One would indicate that they are on the board and the other article would say that they "can."

The question we have is whether a chair of a committee must be a board member, or can someone else chair the committee that would include board members (so board member representation occurs).

A: Many committees are led by the primary board members; but that is not an absolute. It is highly desirable that board members be involved in the works of the Council as much as possible. However, the president may appoint someone (even a non-Vincentian) to chair a committee if it is appropriate. For example, there may be a person who has a lot of experience in operating retail stores that may be appointed as chair of a Stores Committee. Although allowable in the bylaws, not all committee chairs are board members. In an Archdiocesan Council, the primary board members are the District Council presidents. All others are appointments by the president with the approval of the Council. Article 24 refers specifically to standing committees. These vary from Council to Council.

(9/20/2018) Q: A couple of our members questioned the buying of raffle tickets with funds that "belong to the poor." Please clarify.

A: Conferences should not use funds donated to the Society in any way for gambling, this includes buying raffle tickets. Individual members can purchase raffle tickets using their personal resources. This is acceptable to the Rule.

(9/27/2018) Q: Is there a policy regarding use of email when serving people, whether it is providing information about them and the situation, or to provide the treasurer with information to provide financial assistance?

A: We must maintain our emphasis on confidentiality. Email may be used in normal Conference work and in transmitting information about the people we serve with our fellow Vincentians under the following conditions:

1. You must be confident that the recipient of your email is a Vincentian.
2. You should not send the email to a couple or group if you know that one or more parties using the email address is not a Vincentian.

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(9/27/2018) Q: 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?

A: 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.

(10/4/2018) Q: Does the newly elected Conference president need to be inducted into office by the Council president to make it official?

A: 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.

(10/4/2018) Q: When does a newly elected Conference president formally take office?

A: According to the bylaws for Conferences (approved by the National Council), a president's term is from October 1 through September 30 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.

(10/11/2018) Q: How are international disaster declarations handled and who issues them?

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

(10/11/2018) Q: We would like to provide SVdP smocks and T-shirts to our volunteers. Can these be paid for from the Conference funds or do members have to use their own money?

A: If Conference members together agree and want everyone to be dressed in Vincentian apparel for identity sake, use of Conference funds is justified to provide the clothing. Members can still make a voluntary contribution towards purchase of SVdP smocks and T-shirts.

(10/18/2018) Q: Our District Council president resigned recently. Instead of electing a new president, three 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?

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A: 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.

(10/18/2018) Q: 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?

A: 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 District Council bylaws specify additional voting members.

(10/25/2018) Q: 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?

A: 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." This means that the ultimate decisions will be made by Vincentians.

(10/25/2018) Q: 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 SVdPUSA have a requirement that all Conferences with EINs, or those included in the Group Exemption, have a full external CPA audit each year?

A: 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. The IRS does not require it. However, if you want to continue to receive

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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.

(11/22/2018) Q: 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?

A: 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 misuse of credit/debit cards.
3. One option is to use one card for operational expenses and another solely for assistance expenses to support ease of tracking.

(11/22/2018) Q: Does the Society have a policy related to investments that is based on moral objectives?

A: 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. National Council Resolution 140 provides guidance for vetting investments and potential partners in accordance with Catholic Social Teaching. See the document: <http://www.svdpusa.org/members/Documents/Governance-in-A-Box> on the SVdPUSA website.

(11/29/2018) Q: 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?"

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A: 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. In addition, a plan for use of this investment should be in place to avoid the hoarding of funds according to our Rule. Keep in mind that Vincentians should always work with the goal of 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. Hoarding comes into play when a decision is made to keep money in the bank rather than use it to help someone in need.

(11/29/2018) Q: I have a Conference that has started the year with about \$110,000 and after providing to friends in need 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 on what is a reasonable carryover each year to continue operations but not be hoarding?

A: 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. If we have the resources to help, we should be using them.

If a Conference has temporarily satisfied local needs, there are several options to utilize remaining funds. Other nearby Conferences likely have added needs. A richer Conference can "domestic twin" with a Conference with greater needs. Any Conference can "international twin" with a needy Conference anywhere in the Americas (ask Elizabeth Martinez at the National Council for international Conferences that have requested assistance). The National Council at any time likely has a campaign either for the Domestic Disaster Fund or the International Solidarity Fund (for International Disasters) that can always use more help.

(12/6/2018) Q: 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?

A: 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

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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 home visits. It is totally acceptable for a poor Conference to be perpetually twinned.

In some areas the entire parish is poor, including its members of the Society who have the charism but lack financial resources. They want to help but need outside resources from those outside of the community.

There is one known Conference that spends around \$70,000 a year to help those in need in the parish. It receives 95 percent 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.

(12/6/2018) Q: If a Conference currently included in the 501(c)(3) 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?

A: 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. The Conference should not join into a collaborative with a for-profit organization.

(12/13/2018) Q: Our Conference was formed with three parishes into one at the pastor's request because the priest was the same in all three parishes. We are a strong Conference with lots of good works. The president is asking if another parish five miles down the road that has its own priest can join us. I have asked him why they don't start their own, and await his response. Can we allow another parish to join in just because they want to?

A: 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 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),

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the Society is not a business and should not be treated as such. Multi-parish Conferences typically move away from home visits because they have "too many calls and home visits take too much time." Hence, expanding the Conference is not recommended. Individual Conferences are better. Please use this opportunity here to create a new Conference with the invite of the other pastor.

(12/13/2018) Q: A person in need 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, where does confidentiality fit in? I would imagine that we're not the first Conference to encounter this. What's the policy of the Society?

A: 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 shoplifting 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.

(12/20/2018) Q: Should Conferences keep a formal list of each individual contributing donor?

A: 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. National no longer collects contributing members numbers. 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. The IRS requires listing of donors of \$5,000 or more on its Form 990. Other donor listings are optional and dependent upon your local fundraising needs.

(12/20/2018) Q: 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?

A: Under Tools/Programs on the national website is a link to Vincentian Formation. Here is the link for quick access: <https://www.svdpusa.org/members/Programs-Tools/Programs/Vincentian-Formation>. Here you will find great resources on home visits.

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The Serving in Hope: Module VII Our Vincentian Home Visit. It is now available for purchase online at <https://www.svdpusa.org/materials/> or email orders to materials@svdpusa.org.

In addition, part of the Ozanam Orientation also has 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.

(1/3/2019) Q: It is my understanding that only presidents of aggregated Conferences can be voting members of a District Council. Is this correct?

A: 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. Only active members can be officers at any level in the Society. Active membership does not require being part of an "Aggregated" Conference. Again, there is no specification that the Conference must be aggregated for a president to be eligible to vote in a District Council. Although this answers your question, it is highly recommended that Conferences are aggregated as soon as they are eligible (after one year of service).

(1/3/2019) Q: Is there a National policy that all Vincentians must be background checked and fingerprinted?

A: 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.

(1/10/2019) Q: 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?

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A: Every SVdP entity must use a tax exempt EIN. Only Isolated Conferences are eligible to be part of the National Group Tax Exemption. They must have an EIN to be part of the group. Other entities (Councils, Conferences and Special Works) have three options as to how they will be tax exempt:

1. The Council gets its own 501(c)(3) from the IRS and all of their subordinates use that same EIN.
2. Each individual entity has its own EIN and obtains individual tax exemption from the IRS.
3. The Council gets its own 501(c)(3) tax exemption and then applies to the IRS for a Group Exemption (like the current National Group 5496) and includes all of its subordinates in that group. In that case, every entity has a unique EIN.

However they obtain tax exemption, the EIN must not belong to the parish or the (Arch)Diocese. On page 26 of 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.

(1/17/2019) Q: 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?

A: The answer is "no." We welcome new people to be part of the Society,) but there is a process to follow. In the current version of the Rule/Manual of the Society, there is 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 Conferences are to be made by active (full) members only, usually by consensus.

//(1/17/2019) Q: How long do we have to keep our Conference records?

A: 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.

(1/24/2019) Q: Our Conference has just approved a set of bylaws. Now that they are approved, what is the next step?

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A: The bylaws you approved must (should) correspond to the newly-revised 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.

(1/31/2019) Q: 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?

A: 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.

(1/31/2019) Q: I understand that I need a special ID and password in order to do annual reports. Is this true?

A: Yes. 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.svdpmembers.com. 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.

(2/7/2019) Q: 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?

A: 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

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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."

(2/7/2019) Q: I have a 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?

A: During Conference meetings, it is very common to discuss confidential, personal information such as names, addresses, etc., of those we serve 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.

(2/14/2019) Q: 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 from a few years ago that dealt with this matter that may or may 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.

A: In general, if a team feels inadequate to be able to deal with the specifics of 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 overburdening 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 their consciences and decide if this is their proper ministry. I am not familiar with any document coming from the National Council that would force members to go on any call.

(2/14/2019) Q: 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?

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A: 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 by the store 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 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.

(2/28/2019) Q: 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?

A: On our website, 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. To access, [click here](#).

(2/28/2019) Q: 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 is not what we are about."

A: 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.

(3/7/2019) Q: Why do Conferences have to meet so often?

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A: 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 part of the 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.

(3/7/2019) Q: This rule about meeting often - is it something just here in our area or is it required everywhere?

A: The requirement is in our international Rule. On our international website (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 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)."

(3/14/2019) Q: In reference to spending Conference funds down to zero, I believe this is very misleading to members if being prudent means our savings should be six months' worth and for the less prudent it says somewhere in the Rule or Manual, three 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.

A: The Rule tells us not to hoard Conference funds, and not to send funds to non-Vincentian organizations. Beyond this direction, a Conference is left to discern its financial policies and practices with its heart rooted in our charism and our love for the poor. Yes, there needs to be a plan to save and pay for ongoing customary expenses such as space rental, utilities, staff and others. A three to six month reserve for these expenses is usually adequate. If a Conference needs to save some money for future needs such as a new building, pantry fixtures or other capital expenses, this is reasonable only if it is balanced with current needs to serve our neighbors.

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Beyond the considerations above, money is given to the Society with the expectation of serving the poor as soon as practical. Many Conferences set their own limits on this service, either in the number of dollars per home visit or family based on size and needs, or regarding how often the same family can be served. This is done for fairness, not for hoarding. If a Conference receives a large gift today, it may be able to serve more people right away but it would not be fair or prudent to overspend today and not have enough to serve tomorrow. When an extraordinarily large gift is received, Conferences may want to consult with their District Council to determine what options are available in their area to provide additional support.

A revised budget, set from our discerning hearts, can be established when this blessing occurs. Spending "down to zero" or close to it can be done with faith in God to provide, especially when a Conference relies on ongoing member and parishioner contributions. When the needy appear at our door today we should give what we can, rather than making them wait when we have funds in the bank available for the same purposes.

(3/21/2019) Q: 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?

A: 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 define parameters under which everyone can work.

(5/16/2019) Q: A due to personal district president notified us that reasons a leave of absence through the end of the calendar year is needed. We have reviewed the bylaws and it doesn't seem to be clear on this and wanted to see whether there is precedent from the past that we should be aware of or anything that you recommend we consider? The president's term began on 10/1/18 and missed our last board meeting, and will miss the next five board meetings along with three quarterly district meetings.

A: As long as the president ensures that the district is represented by a proxy at the board meetings and as long as the vice president is okay with running the district while the president is gone, it can be approved by the board. The important thing is that the district (and the board) does not suffer from the president's absence.

(5/23/2019) Q: Our Conference has received a request for membership from a person who admits they are not now attending Mass and haven't been for some time. After responding that our ministry requires members to be practicing Catholics, this person said they were shocked that we would not let them be a part of our ministry when it might actually be the catalyst for them to be more involved in the Church. Was I incorrect in stating this requirement?

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A: There is nothing in the Rule that requires an active member to be a "practicing" Catholic - just a Catholic. It is too difficult to determine to what degree a person is practicing.

Another option is for the individual to serve as an associate member. According to the Rule, Part III, Statute 3 in summary, an associate member is someone who helps us with our works of service. He/she may or may not be Catholic. He/she may not attend meetings regularly. An associate member cannot vote and cannot be an officer of the Conference. Many Conferences throughout the country have associate members. For example, someone who wants to help by maintaining the food in the pantry but doesn't want to take part in meetings or other activities of the Conference.

All new members should be formally approved by the Conference. There is no special interview process or checking that has to be done except that they meet the criteria specified in The Rule.

(6/8/2019) Q: How often should bylaws be adopted by a Council or Conference?

A: Bylaws should be readopted at least every time National makes updates to the bylaws. Good governance suggests a bylaws review every five years to assure they are current with the law, operations and one's mission. Older bylaws should not be retained since the newer bylaws reflect what is approved by National, which may in some cases be different from the prior versions.

(6/8/2019) Q: I know over the last year that the bylaws on the national website have been revised. What is the final date revisions were made through? When should they be used as a boilerplate for Councils and Conferences?

A: Councils and Conferences Bylaws with revisions were finalized April 27, 2019 and should be used immediately as boilerplate examples for adoption. The National Council Bylaws revisions were made May 20, 2018.

(7/4/2019) Q: 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?

A: In 2005, the National Council approved bylaws to be used by all Councils and Conferences throughout the country. Changes were made to the National Bylaws and approved by the National Council Members at Midyear 2018. Updates were determined necessary in view of our new Mission, for further clarity and the changing legal requirements. The changes to the Councils and Conferences sets of bylaws finalized at Midyear 2019, were intended to reflect the changes to the National Bylaws. Clarity in wording was emphasized during the process. In the bylaws 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 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.

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(7/11/2019) Q: 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?

A: 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.

(7/11/2019) Q: Can you tell me the average number of members there are in each Conference in the United States?

A: Based on the 2017 Consolidated Annual Report, 4,485 Conferences reported having 85,811 Active Members and 12,632 Associate Members. This makes the U.S. average 19.1 Active Members per Conference. This also makes the U.S. average 21.9 Active and Associate Members per Conference. The statistical range, however, tells another story as some (too many) Conferences have only a few members while the largest have several hundred members!

(7/18/2019) Q: Do the Conferences have to have bylaws or can they adopt the Council's? If they have to have them, how often do they need to be renewed?

A: 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 in the section on 501(c)3 documents. Every few years, the National Council may approve some minor wording changes to the sets of bylaws. At that time that they should be reviewed and re-adopted.

(7/25/2019) Q: I have a Conference that was formed from three parishes 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 five miles down the road that has its own priest can join them? I have asked him why they don't start their own. I am awaiting his response. Can you tell me if we allow another parish to join in just because they want to?

A: I am sure that managing the calls from three parish areas is difficult. Ideally, you should have three separate Conferences. The pastor staffing 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. I have seen multi-parish Conferences move away

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from home visits because they have "too many calls 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 the number of included parishes. Individual Conferences are better, including among those parishes already included. The current Conference can instead mentor the start-up of the new Conference.

(8/1/2019) Q: Will our Vincentians be arrested if ICE shows up while we are serving someone in need who happens to be in the country illegally?

A: While this may seem to be more likely in some states, illegal residents live now all across the country. We don't ask about citizen status when we agree to make a Home Visit, and unless we need such a classification to help them access services, we have no need to ask and we never judge those we serve. Unless we are actively shielding someone from law enforcement, there is no reason for a Vincentian to be detained other than briefly to ascertain their own citizenship status. In various places in Conference and Council bylaws, we agree to follow all laws and regulations, and also in the Rule (Part I Article 1.4 and Part III Statute 8) we serve without regard to race, ethnicity or other demographic factors. We recommend for peace of mind purposes that Vincentians wear a SVdP tunic/smock and have ID with them to show they are providing services should law enforcement arrive during our work. Most law enforcement groups know and respect our community participation!

(8/8/2019) Q: 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 those 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.

A: 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 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.

(8/8/2019) Q: We have a Conference that is interested in getting a determination of the needs in the community as seen from our friend in need perspectives. 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 our friends in need that have been served by the local Conference. No names or

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addresses would be provided with the phone numbers. One could argue that the phone numbers by themselves do not break the confidentiality. Could you give me your thoughts on this?

A: 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.

(8/15/2019) Q: 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?

A: 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.

(8/15/2019) Q: 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 indicated 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, rather the first year ending on September 30. The president is unwilling to continue his presidency even for three months. Is this the proper way to handle this turnover?

A: Conference bylaws state that a president's term begins on October 1 of the year he/she is elected. If a president is unavailable to serve (including resignation) for a period of time deemed by the Conference close enough to September 30, the vice president may serve in their place. The Conference then has time to follow the formal process of nominating a committee and election. We 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) under Council/Conference Documents. It is called "Election Process-Conference." The vice president does NOT simply move into the president's role except for the interim role/period.

(8/22/2019) Q: I was told that the neighboring Conference pays their workers who help out in their store. I know in the surrounding areas this is all volunteer work. Is this true that store hires their employees?

A: Stores provide opportunities for both revenues to be used to serve our friends in need, as well as a place for those in need to shop with dignity, for example using vouchers provided by the Society during Home Visits. Some Society stores are operated solely by volunteers, while others use solely paid staff. Either is allowed in our Society's governance. There are challenges and even legal

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considerations, however, when there are both paid and volunteer store workers in the same store and with the same job descriptions. We must consider the Special Works operations of a donated good system and retail store a business and not a hobby, and staff accordingly.

(8/22/2019) Q: Are Diocesan Council presidents required to attend national and regional meetings. (I cannot find this anywhere.)

A: 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... 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."

(9/5/2019) Q: 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 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?

A: Money and material goods such as thrift store donations are given by our donors to help the poor, not to enrich in any way our staff or volunteers. Vincentians don't expect such recognition for their time and talents given to God and to the poor. This includes recognitions and parties. However, if the organization feels such a recognition event is warranted, it is a proper Society administrative expense. Therefore, it would be proper in this case for the Council / Conference to purchase the store goods and devote them to a party in the same way that food, decorations etc., are purchased for the same event. In this way the store receives the funds as a sale and commits them like other sales to the allowed purposes. This process maintains the donor intent line of sight.

(9/12/2019) Q: What is the Rule "number" for proxies voting in the place of a Conference president, in a District Council election?

A: The proper citation is not in the Rule. 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.

(9/19/2019) Q: 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?

A: 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

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do checkbook charity -- we are to be involved in person-to-person works. If our donors wished for their funds to go to other organizations, they would have given them the funds.

(9/26/2019) Q: Our Conference president second term is ending and no members will step forward to be nominated. How long does an individual who is not currently a member of the Society have to join and become a member, before he or she can be nominated as the only candidate for Conference president?

A: The Rule says only active members of the Society can be officers at any level. An active member must be Catholic, attend meetings on a regular basis, and participate in the works of the Society. The question of how long a person needs to participate in the above in order to be considered active can only be answered by the Conference as a whole. However, there is the consideration of Resolution 93 which the National Council passed in 2011. It requires all new members to attend the Ozanam Orientation. In accordance with Resolution 93, effective 2011 new officers must take the OO before taking office. The Ozanam Orientation must be taken before taking office, for all Council and Conference officers and Spiritual Advisors.

The Society does not want people in place as Vincentian officers who do not know what the Society is about, thus the requirement for Ozanam Orientation training. Also, the Society does not want people in Officer roles who don't understand the way the Society works. It's the reason why we don't recruit simply to get a new president or officers.

(9/26/2019) Q: 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 five 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?

A: The biggest problem that Vincentian home visitors face is making decisions influenced by the requester's life style. This is where crossing the judgmental line comes into play. Basing aid on a number of animals in the home is judging. We might each decide upon a different number, even only one pet! It is no different than giving aid based on the number of televisions in the home. You can and should provide your good advice to the best of your ability. However, our 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.

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(10/3/2019) Q: Why are our chapters called Conferences? In informal discussion with those not privy to our bureaucracy, we call ourselves a chapter to avoid any confusion. Is this acceptable?

A: When we formed we were called a Conference of Charity. The early founders actually discussed the term and decided to maintain the name. The Society is more of a fraternal organization than a simple membership organization. The name evolved and Conference is a derivation of the origin. A different name should not be used to describe a SVdP Conference as it unintentionally changes the meaning of our relationships.

(10/10/2019) Q: A question has come up at our Conference about the need to have two members interview a friend in need. We make some home visits but for the most part we interview those in need at our office, and a single member interviews. Is this acceptable?

A: Interviews with those in need require two Vincentians, whether in their home, in an office, or at a mutually agreed to location. Person-to-person member visits with those we serve should always be in twos. This also includes the occasional times when members provide transportation to those seeking help (i.e. taking someone to a doctor's appointment). This requirement protects all involved from many types of accusations, and reduces misinterpretations during conversations.

(10/10/2019) Q: Is it against the Rule or do you think it would constitute a conflict of interest for a parish social outreach staff (paid) to also serve as the parish Conference president?

A: The Conference needs to decide this. This person is an employee of the parish and the pastor, and is responsible to the pastor for his or her job. Where would the loyalty lie? Would this person be more influenced by the pastor or by the Rule of the Society? It can be a significant conflict.

(10/17/2019) Q: Can members offer prayer before distributing food and then invite those we serve to pray with us afterwards if they wish?

A: In Frederic Ozanam's 1848 address to the General Assembly of the Council General, "Let us only introduce religion into our conversations when it comes up naturally. It is to be feared that an overzealous desire to convert people merely produces hypocrites." In Ozanam's eyes, visiting the poor in their homes, an indispensable task of the members, should be carried out in a spirit of humility. ("Ozanam," Commemorative Book page 24, ©1997).

(10/17/2019) Q: Our Council has traditionally collected and stored personal information of those we serve, such as driver's licenses and social security numbers. We are in the process of going "paperless" and personal information will be stored "in the cloud." Our attorney advises us to stop collecting driver's license and social security numbers but there are government contracts which sometimes require this data. What is national policy or advice on this?

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A: National advises our Conferences not to solicit social security numbers. According to SSA regulations, the SSN is not to be used for identification. Even Medicare has stopped using SSN as an identifier. However, that does not stop agencies from asking for it. Because of the potential for identity theft, the same should hold true for driver's license number. It is recommended that intake paperwork have a Yes or No question to indicate that the interviewer saw a valid SSN and DL without recording the numbers.

(10/24/2019) Q: I know that the president of a Conference cannot serve consecutively for more than two 3-year terms. Why when it is difficult to find candidates?

A: The Conference needs to grow and members need to bring forward new leadership. Members should fully participate in the spirituality and work of the Conference - including leadership. Conference growth requires new leadership. Even the National president is limited to a single six year term.

(10/24/2019) Q: 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 501c3 status as part of the National Group Exemption, or establish their own exemption separate from their parish/the Archdiocese?

A: Every SVdP entity must use a tax exempt EIN. Only Isolated Conferences are eligible to be part of the National Group Tax Exemption; they must have an EIN to be part of the group. Other entities (Councils, Conferences and Special Works) have three options as to how they will be tax exempt: 1. The Council gets its own 501(c)(3) from the IRS and all of their subordinates use that same EIN. 2. Each individual entity has its own EIN and obtains individual tax exemption from the IRS. 3. The Council gets its own 501(c)(3) tax exemption and then applies to the IRS for a Group Exemption (like the current National Group 5496) and includes all of its subordinates in that group. In that case, every entity has a unique EIN.

However they obtain tax exemption, the EIN must not belong to the parish or the (Arch)Diocese. On page 26 of 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.

(10/31/2019) Q: I am taking office as a new Conference president. I would like to have an audit done for our Conference. Is it proper for me to do so?

A: Yes. The Rule is explicit; Conferences are required to have an informal annual audit. It is especially recommended when a new president is taking office. This helps assure the Conference members that they are following proper procedures and all is well. If all is not well, then corrective

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action must be taken. Audit procedures can be found in Governance-in-a-Box: Conference Audit Manual and Worksheets. Also, the Rule, Part III, Statute 27 authorizes a Council president to call for an audit when he/she determines it is appropriate.

(10/31/2019) Q: Our Conference occasionally needs to order things online and we don't want to use a debit card from our checking account. I am applying for a special credit card from our bank that is for non-profits. But in the application they ask for "Proof of Legal Identity" by supplying one of the following documents: Articles of Incorporation, Trust Instrument, Secretary of State Filing, Certificate of Good Standing or Government-Issued Business License. I looked in the Governance in a Box and could not find any of these documents. Do you know if individual Conferences have these documents or are they all controlled from our National Offices? We use our Council's Tax ID number and we are included on their IRS Form 990. We do not have a separate Tax ID number.

A: If you are organized and have tax-exemption status under a Council, you should work with your Council to set up your debit card or credit card account. This matter should be based on who the legal entity is, or whose name the EIN# is listed under. If the Council is the legal entity and not the Conference, you must work with your Council to obtain the 'proof of legal identity.' None of the documents listed are owned or managed by National. If you are in an Isolated Conference or if the Conference otherwise has its own EIN, then those documents and licenses are controlled at the local level.

(11/14/2019) Q: I know what the Rule states regarding membership. Full members are Catholics with full voting rights. Are there exceptions to the Rule regarding full members not being Catholic and having voting rights? So, no matter how active these members are, they are associates, correct? I just want a confirmation. It doesn't seem Christian to have members who attend all the meetings and participate fully in all the Council and Conference events and yet not acknowledge them as full members. And, I'm not saying let them be officers ... I'm just saying full members, since they participate in all the activities.

A: The Rule Part 1, 1.1 states that the Society is an international Catholic voluntary organization. It also states that to be an active member, you have to be Catholic. And, only active members have a vote (when votes are taken). Remember, the Rule states that consensus is the normal mode for decision making and formal votes should only take place when necessary.

(11/21/2019) Q: Are contributing members no longer a classification in the SVdP Quarterly and Annual Reports?

A: The "contributing members" classification was removed from the annual report and Part III of the Rule (revised December 2018). It is more of an honorary title rather than an official classification designation.

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(12/19/2019) Q: Is it permissible for non-Catholic associate members to be members of our board of directors?

A: Non-Catholics may not be officers. That is confirmed in the Rule, Part III, Statute 3: "Only Active Members hold office in the organization." Non-Catholics cannot be Active Members. Many of our Councils have members of the community (non-Vincentians) as members of their boards of directors. Those members of the community may or may not be Catholic. Keep in mind that the majority of board members must be Active Members of the Society. The Nationally approved bylaws have the following statement: "Active Members of the Society must always be a majority of the voting members of the corporation board."

(1/2/2020) Q: When attending a Midyear Meeting, does the National Council member have to be from a Council that is "instituted?"

A: Article 16 of the National Bylaws clearly states: "Each National Council Member has one vote." So in order to vote or effectively participate in any meeting, you must be a National Council Member or his/her valid proxy. Article 11 refers to membership in the National Council being presidents of "instituted" Councils. So, whether it is the Midyear or the annual National Assembly, the requirement is that the voting member must be from an "instituted" Council.

(1/2/2020) Q: We just received notice to provide files, records, etc. to the ADCC for their audit purposes. Would our Conference be a part of their audit if we have a separate EIN# and 501 (c)(3)?

A: The audit typically includes all entities using the Council's EIN. If your Conference is using its own then your Conference should conduct a separate audit that forms your annual Form 990 filing to the IRS. Part III of The Rule, Statute 27 states: 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. Check with the Council to see if they need raw financials or if an annual report works to help the Council calculate its (and your) annual solidarity and any other joint financial obligations. Apart from the financial audit, the Council may also have need of service and membership numbers for annual reporting.

(1/9/2020) Q: We have recently had several situations whereby members of our Conference have set up and gone to a home visit only to find out when we arrived that the individual doesn't want us to come into his/her home. Should we continue as we have done, that is, stand outside, or choose not to proceed if the person won't let us into their house?

A: Make it clear when setting the appointment that, if they really need assistance, the visit is in the home - not in the doorway. Doorways provide no privacy and do not allow for the type of interview Vincentians are to make. If necessary, this visit can be conducted in an alternative location that is safe and convenient for all parties. The house is not the central concern; it's the people.

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(1/9/2020) Q: Our district has for a long time kept a list of those we serve that appear to be trying or have succeeded in scamming our Conferences. It is a "be aware" list. It is still up to each Conference if they want to help someone on the list. Is this a good way to monitor those we serve and how long should they stay on the list?

A: No one on a "be aware list" should be on that list longer than a year. Circumstances always change. 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 in the poor. No Conference should have a resolution that supports this activity.

(1/16/2020) Q: Our Conference is now associated with United Way. We applied for and have been awarded a grant from them. I understand they have requested that we add their name and logo to our letterhead. Is this acceptable?

A: National's Identity Manual allows the use of other logos as long as they are not more prominent than ours.

(1/16/2020) Q: We have an issue regarding the Rule on Conference spirituality. We have a member that feels the Rule states that our meetings should be just spiritually based on doing the readings and sharing with each other's understanding of the readings. Others believe we should use the reflections provided by National. What should we do?

A: The objectives of the Society are growth in holiness, community, and service. All three must be present during a meeting. The spiritual reading and discussion affect the first two objectives. National provides a series of readings for meetings based on the Sunday Gospels with suggested discussion questions. These are not mandatory. Other readings that have a meaning related to our ministry can be used with discussion around those readings. This is the choice of the Spiritual Advisor. The spirituality portion of the meeting is extremely important and should not be bypassed or abbreviated.

(1/23/2020) Q: 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?

A: 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. Most Conferences have no need for any endowment or an endowment campaign, unless it is raising and holding funds in reserve for capital needs. Money collected today is to be spent on today's needs. Without a specific plan for long-term funds, it is considered hoarding and

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against the Rule. Councils are more likely to have the long-term needs suitable for endowment funds.

(1/23/2020) Q: One of our Conferences has a 17 year old that is interested in becoming a member. She happens to be the daughter of a couple who are Conference members. The Rule says young members are encouraged to join but there is nothing about age. Could you tell us what age an individual can join a Conference?

A: This is a Conference decision. There is no specific guidance. You might need to consider any Diocesan rules for serving families or youth, child protection requirements, and your insurance/liability policies as to whom is covered. There may be an "adult" requirement that would keep a minor in an associate or supervised role until the age requirement is attained.

This is a Conference decision.

(1/30/2020) Q: If we host a dinner meeting with some potential donors, is it permissible to pay for that meal with a Society issued credit card?

A: This is a cardholder/responsible party decision, not a standard of the Society. A typical expense reimbursement policy to follow is:

- The meal would be a reasonable one - not extravagant.
- Alcoholic beverages are not reimbursable.
- Tip max is 20%.
- Receipt would have marked on it for audit: names and number of people and purpose of meeting.

(1/30/2020) Q: Do Conferences need a simple or a 2/3 majority vote to approve the new Bylaws if a consensus cannot be reached?

A: The Rule, Part I, Article 3.10 calls for decisions to be made by consensus: "All decisions are made by consensus after the necessary prayer, reflection and consultation. The democratic spirit is fundamental at all levels of the Society and, when appropriate, matters are put to a vote." The simple majority applies to most decisions after a quorum is met. Generally speaking, the 2/3 vote only applies to amendments to the bylaws. This 2/3 is of all voting members - not just who is present. Since this is so specific, it is best that this be a vote rather than consensus. The motion and resulting decision must be recorded. Please refer to your state laws to see if there are other voting legal requirements.

(2/6/2020) Q: Our Conference has a very old truck that needs to be replaced, is it okay for us to set up a Go Fund Me fundraiser account to raise money?

A: Vincentians are discouraged from using fund me accounts and the National Council's position is that they should not be used. It is too difficult to monitor and determine who the donors are.

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(2/6/2020) Q: Some of our Conferences receive donations in the form of gift cards to super markets and places like Target which they then distribute to friends in need 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.

A: 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.

(2/20/2020) Q: I have a real problem with the ethnic breakdown that is requested on the Annual Conference 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.

A: The Society does not use this information in any discriminatory way. The ethnicity information is collected only in the aggregate. 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 and inclusive the Society has become. Occasionally, there are questions related to this from major funders.

(2/27/2020) Q: 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?

A: The changes to bylaws are made through resolutions approved by National Council Members (These are the elected presidents of the highest Council in your diocese) 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 website for access by membership. The bylaws are found on www.svdpusa.org and 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 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.

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(2/27/2020) Q: 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?

A: 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 the requirements associated with the grant request or withdraw the request. Depending on your finance relationships with your Council, you may be able to obtain a Conference audit as part of your Council's audit, or bundle the work to reduce the cost of your separate audit.

(3/5/2020) Q: 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?

A: 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. The Rule does say an Active Member must be Catholic, attend meetings on a regular basis, and provide person-to-person service to those in need. A true Active Member will make an effort to attend all meetings, will want to be with fellow Vincentians as often as possible and will attend the far majority of all meetings.

(3/5/2020) Q: 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?

A: This is a Conference decision; however, such 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 asks 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 of their circumstances. 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

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infinity." Let's remember that providing service does not always mean "giving money," listening and prayer are also two essential services Vincentians provide, hopefully without limits.

(3/12/2020) Q: Resolution 114 says that a Conference can be "suspended" and it talks about an appeal process. But I'm not finding anything that tells us what needs to be done to suspend a Conference. For example, if a Conference refused to give us annual financial reports, according to Resolution 114 they can be suspended. But, who tells them? Is it a local decision (e.g. Archdiocesan Council)? Does it have to be in writing? Etc.? Guidance? Where do I find this information?

A: The Council must submit a letter to the national vice president for the region showing the specifics of why the Conference should be suspended/dissolved. This letter must also include everything that was done to correct the situation. The national vice president, if convinced the information is sufficient, will submit the suspension request to the national president. If the national vice president or the national president is not satisfied with the information given, he/she will advise the next steps. Only the national president may suspend a member or a Conference.

(3/12/2020) Q: A parishioner has come to us asking if we could help with a loan of around \$2,000 for a real estate problem that may keep the lender from foreclosing on her home. Is this allowed?

A: Conferences generally don't loan money, they give gifts to those in need. Giving loans and 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. When we give assistance to people, it is given as a gift - not a loan; we should not look for repayment nor a return.

(3/19/2020) Q: Census takers want to come to our daytime-only homeless shelter to conduct the Census. What is the Society's policy on this?

A: Homeless Day Centers are not residences. Taking a count at a day center could end up with duplicate information since the homeless move around. We suggest that information can be given to day center visitors to be completed using other addresses. It is important to count everyone regardless of home status in order to project federal and state resources. Please be helpful without violating anyone's privacy or personal information.

(3/19/2020) Q: When we do an initial home visit, is it okay to ask for tax returns from the person we visit? This could help us to determine the level of service needed.

A: We have no reason to ask for tax returns and this is not a practice supported by the National Council. The exception of course is if the Conference provides free tax return services. A Home Visitor may ask someone in need for utility, rent and other statements to help them achieve proper payments to the correct recipients and to help the family with budgeting/financial literacy education services. These are voluntary.

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(3/26/2020) Q: Are employees of St. Vincent Thrift Stores allowed to be voting members at the local Conference? What if the thrift store is operated by the Conference that the employee is a member of? In that scenario, is the employee allowed to vote? That would appear to be a conflict of interest.

A: Store employees, like all employees of the Society at any level, can be Conference members but not officers. They may vote on all Conference matters except those which are a conflict of interest, including any that affect the store or their work as employees.

(3/26/2020) Q: Our Conference is required to tithe with our Diocesan Council. We do send some money each month, but not always the percentage requested. Is this an acceptable policy that we are doing?

A: The National Council Bylaws define the governance within the Society in the United States. You are under the governance structure of the Diocesan Council. Such decisions are made by the Diocesan Council, by vote or consensus. Once the decision is made, all members must abide by the decision whether they agree with it or not. The Rule, Part III, Statute 24 requires Conferences to provide financial support to the District and Diocesan Council in the form of solidarity contributions. It is up to each Diocesan Council to determine what each entity in their Diocesan Council should pay toward that total solidarity contribution. If no Diocesan Council exists, the District Council may assess a solidarity contribution from its Conferences, stores and special works. There is no specific "tithing" requirement.

(4/2/2020) Q: I am doing a project about how students should participate in community service for my senior college Social Work class. What is the eligibility criterion for the services provided by the Society? What roles do social workers have in your organization?

A: There are no eligibility criteria. We assist all in need regardless of age, race, religion or creed. There is no formal role of a social worker; some add great value as volunteer Vincentians. The Society does not use "social workers" per say. Our members generally assess the needs of those we serve.

(4/9/2020) Q: Our store has been up and running successfully for a while. We now are getting a large number of "walk-in" friends in need. We have hired one of our current Vincentians, who is experienced with the home visit process, as an "intake coordinator." We will continue to use the Home Visit process, but will have the coordinator do intake documentation, refer to other sources of help, coordinate volunteers for home visits, and handle immediate service for basic human needs emergencies.

We would greatly appreciate any documentation on position descriptions, words of wisdom, or other guidelines to get started with this process.

A: Here are some considerations:

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1. You are hiring a Vincentian to be the intake coordinator. This means that that person will not be eligible for a role as an officer of the Conference. Paid staff are not allowed to be officers. This person can still be a member, but not an officer.
2. The role of paid staff is to assist Vincentians in the work they do - not do their works of charity for them.
3. The interview and decisions for assistance should be done by two Vincentians, with someone working with the intake coordinator during interviews to decide what basic assistance is to be given.
4. There is no national documentation such as a job description describing an intake coordinator.

(4/9/2020) Q: Can you give me a list of days of the calendar year for celebrating Frederic Ozanam, Rosalie Rendu and St. Vincent de Paul?

A: For feast days, please refer to page 10 of the Manual which states: According to the original Rule and the Society's tradition, Vincentians celebrate "Festival Meetings," gathering together for Mass and a meeting. Today the Society meets on one or more of the following: the Feast of Blessed Rosalie Rendu (Feb 7th), Ozanam Sunday (the last Sunday of April), in honor of the April 23rd birthday of Frédéric Ozanam), the Feast of Blessed Frédéric Ozanam (Sept 9th), the Feast of St. Vincent de Paul (Sept 27th), the Feast of the Immaculate Conception (Dec 8th), the Feast of Our Lady of Guadalupe (Dec 12th). See also Rule: Part III, Statute 9.

(4/16/2020) Q: A member of my Conference said our Regional Vice President does not have a vote at the National level. Can you verify this?

A: According to National Council Bylaws, each of the eight Regional Vice Presidents is a voting member of the National Board of Directors. However, the Regional Vice Presidents do not have a vote on the National Council. The voting members of the National Council are the National President and the duly elected National Council Members (each representing a Catholic Diocese where the Society is present).

(4/16/2020) Q: We want to be contributing members. Is there some membership form or anything?

A: Contributing Member status is available at the parish Conference level. No one should be considered a Contributing Member without the Conference as a whole agreeing to it. All new members should be formally approved by the Conference. There is no special interview process or checking that has to be done except that they meet the criteria specified in The Rule.

Contributing Members require no formal action for enrollment. Recognition of such status is simply granted by the Society in acknowledging the financial, material or time 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.

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Although their contributions are essential to our ministry, our National Council is no longer gathering information about Contributing Members. We are encouraging our Contributing Members to help us in our efforts by becoming Associate Members. Associate Members assist by helping in the direct service to our friends in need. Associate Members help us not only in direct service but also contribute financially and materially to our ministry.

(4/23/2020) Q: Our Conference has been given collections and the poor box funds for many years. Our treasurer has a key for the poor box and empties it on a regular basis. Our pastor told us that, by order from the diocese, the parish must count the funds in collections and the poor box before giving the funds to SVdP. We feel like there is a lack of trust and are not sure what to make of this change.

A: This is a common practice in many parts of the country. The parish is held responsible for all collections of funds. The parish provides the counters, records the collections and then turns the funds over to the Society. This is an accountability process that works well. As long as there is a good working relationship between the pastor/parish and the Conference, there should be no concern in this matter.

(4/23/2020) Q: I am seeing presidents elected without a quorum. So many do not attend the meetings; maybe a paper ballot will suffice? When we elect a Council president, we have an email from every Conference.

A: No election should occur without a quorum or without the presence of members! 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 eight 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.

The nomination committee should double check the ballot count and should ensure that quorums and majorities are covered. With that, the Council or Conference will be confident the results are correct and valid. Voting is only valid when a quorum of members is present. Although meetings are only valid when ALL members are invited to attend, a quorum is a majority of eligible voting members.

(4/30/2020) Q: During this Coronavirus pandemic we are not doing any Home Visits with our friends in need, how do we keep track of our phone interviews? Where should we enter the hours we spend and the number of people we help over the phone, sometimes it is a referral, counseling or sometimes we are paying a bill?

A: Phone interviews in place of Home Visits are now being done across the country due to the Coronavirus and should be reported in the same manner as you would a Home Visit, except phone interviews should be entered under Other In-Person Visits on the Conference annual report.

(4/30/2020) (Q: We have a Conference that has been devoted solely to a food pantry for many years. Are we required to hold meetings like regular Conferences? We have tried to get

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members to do Home Visits without much success. What are some ways we can introduce spirituality to our food pantry Conference members so that they might feel the same spiritual growth that occurs on Home Visits. Do you have any recommendations for us to enhance our personal spiritual growth as we interact with those we serve in the pantry?

A: The Conference should be meeting regularly as any other Conference and fulfilling the spiritual requirement of the meetings. In addition, before opening the pantry, members should pray together using the Conference meeting opening prayer and when the pantry closes, members should gather to share in the closing prayer. To those we serve members can distribute holy cards, rosaries or other sacramental with groceries given away.

(5/7/2020) Q: Statute 12 in Part III of the Rule says "... appointees must not be related to the person empowered to make the appointments ..." Can an exception to this requirement be made, if no one except a related member steps forward?

A: The words "must not" in this statute are mandatory and therefore presidential appointment of relatives must not be made. This is an enforceable mandate.

(5/14/2020) Q: Is it acceptable to earn interest on Conference bank account balances? When the question of earning interest came-up at several of our Conference meetings over the past years, the president said we are not permitted to earn interest because of our nonprofit status.

A: We can earn interest on our funds. Many of our Conferences have checking accounts in Credit Unions and Savings and Loans instead of banks. Both pay interest and this is common practice with many Conferences. However, receiving interest must not be a reason to decline using funds to assist those in need.

(5/21/2020) Q: We have eight active members but no associate members. What is the minimum and maximum number of active and associate members allowed in a Conference?

A: The absolute minimum number of members needed in a Conference is four, which are the officers; or five members if a spiritual advisor is appointed. A minimum of six or seven members is recommended to have an effective Conference. The maximum number depends on the number of activities and what the Conference wants to accomplish in terms of the needs of the community that is being served. No more than 20 is recommended.

(5/21/2020) Q: Is there a particular protocol to follow when a friend in need threatens to harm him/herself?

A: For members of the Society, there is no legal obligation to report such findings. There is a moral obligation when there is strong suspicion or if the behavior is witnessed. This question should be presented to your diocese who can give helpful contact numbers for referral.

(5/28/2020) Q: Our churches will become one parish and have a new name but both churches will remain open. Both churches have a St. Vincent de Paul Conference. Do we have to become one Conference and combine our income together or can we operate separately?

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A: There is no official document that says there should be one Conference per parish. If there are two separate parish Conferences each serving separate communities, there should be no problem continuing to operate individually; presuming each has a different name for legal and separate identifications. In the end, the ultimate decision is that decided upon by the Conferences involved after consultation with District and Diocesan Councils as well as with the pastor. He will have to come to an agreement with the Conference(s) on how financial support will be provided.

(5/28/2020) Q: Can Councils create endowment scholarships?

A: Endowments are permitted as long as they are funded by donations specifically for that purpose. Funds identified for service to those in need should not be used to build an endowment. An endowment campaign can be established to solicit funds specifically for the purpose desired.

(6/4/2020) Q: How should Councils/Conferences hold elections during COVID-19 while practicing social distancing? How can elections by email meet the requirements of the Rule for a secret ballot vote by active members?

A: It is important to hold timely elections. The important thing to remember is that the Rule does not change, even during the COVID-19 pandemic. While practicing social distancing, Vincentians are being creative in conducting Society affairs. For elections, ballots are mailed to active members with self-addressed postage paid return envelopes for secrecy. The completed ballots are then returned to the nominating committee chair for the committee count and results. This is announced by conference call or virtual meetings such as Zoom video. The election results are published in the minutes afterwards.

(6/4/2020) Q: A question has come up at our Conference about the need to have two members interview a friend in need. We make some home visits and for the most part conduct interviews at our office. Sometimes, at the office, a single member interviews. Your thoughts, particularly while we are practicing social distance during the coronavirus endemic?

A: Prior to COVID-19 interviews with those in need required two Vincentians, whether in their home, in an office, or at a mutually agreed to location. During the pandemic if conference calls or Zoom meetings are possible two Vincentians should participate. Where there is no direct contact with those we serve one member can make the call to our friend in need and then report the conversation to the rest of the conference. The follow up should be made by another member.

(6/18/2020) Q: Can you cite the portion of the bylaws that does not allow us to hire anyone with any sexual charges?

A: There is nothing in The Rule or bylaws that explicitly prohibits this. We recommend you check with legal or HR experts to ensure a policy is appropriate in your jurisdiction. In 2011, the National Council passed Resolution 91 which states: "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." Usually, this is part of the consideration that comes into play throughout each diocese when it comes to ensuring a safe environment for children and vulnerable adults.

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People look upon the members and employees of St. Vincent de Paul as trustworthy, someone who is safe to be around. We need to ensure this is true. It would also be helpful to consult with the department in your Diocese that oversees these issues.

(7/2/2020) Q: Can you give me some examples of how “The Rule” was changed several years ago in regards to more emphasis on spirituality?

A: In the old Rule and Manual, there were essentially less than a handful of mentions of spirituality. The second chapter in Part I addressed spirituality. The Rule also indicated briefly the need for a Spiritual Advisor. The Conference meeting agenda also included a spiritual reading and discussion. The Manual also had occasional mentions of spirituality.

In the new Rule, Part I has several Articles (2.1 through 2.6) specifically related to spirituality. Part I continues with additional articles spread throughout referencing our relationship to the Church and the Church's social teachings. Part III addresses spirituality in the first four statutes and then liberally throughout the rest of Part III. The Manual devotes essentially the entire second half of the book to spirituality.

(7/16/2020) Q: Is it proper for a Conference to take some funds from a bequest and place them into Certificates of Deposit (CDs) with different maturity dates?

A: It is okay to put money in CDs as long as there is a specific plan for reducing those funds to zero. Our purpose is not to build bank accounts or earn interest. The issue of hoarding comes into play when decisions are made to keep money in the bank instead of helping someone in need. Will the Conference readily cash in the CDs in order to help those in need rather than allow the CDs to go to maturity? Conference funds are not to be used for “endowments” unless the funds were specifically collected for that purpose with the donor’s direction.

(7/23/2020) Q: I understand the concerns raised with home visits regarding both safety and comportment. it is difficult to argue at the local level on behalf of the principles of two people per home visit and two people per office visit if these tenets are not specifically addressed in the very extensive list of Society Rules that exist. Did I simply miss those 'rules'? If so, could you please refer me to the section and article number where they are written. If there are no 'rules' that directly address these issues, which you describe as ostensibly central to the dogma of the organization, what explanation can you provide for their absence?

A: The following are instances in The Rule and Manual where working in pairs is the standard of the Society.

The Rule, Part III, Statute 8: Home visits always are made in pairs.

Manual, Page 7, Origins of the Society: Members of the Society, Vincentians, went two by two to the homes of the poor to respond to their needs.

Manual, Page 23, Home Visitation: Vincentians always visit in pairs. This practice emphasizes the Conference's status as a community, not a collection of individuals who "do their own thing." The visiting team is ideally composed of Vincentians of both genders, various age groups, and different life experiences, so that a better perspective of the needy person's situation can be gained, and

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various courses of action explored. From the beginning, Vincentian visitation to the needy was done in pairs for the protection both of the needy person and the members. The precedent was set by Christ Himself, when He sent out the Apostles two by two (MK 6:7). The Society wisely continues this tradition in the interest of safety, liability and propriety.

In addition, 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.

For more information on this topic, [click here](#) to view a contemplation by National Formation Director, Tim Williams.

(7/23/2020) Q: Who makes up the executive board of a Conference?

A: The far majority of all Conferences use Bylaws document 1. There normally is no executive board for Conferences. The Manual and Rule speak of a Conference board. This is not a formal board of directors. It is also not an executive board which has specific authority granted to it. The Conference board is simply the slate of officers (President, Vice President(s), Secretary, and Treasurer). They have no specific authority other than representation of the Conference and requirement to fulfill specific tasks. All decisions are made by the Active Members of the Conference as a whole.

However, if the Conference is incorporated separately (using Bylaws document 2), there may be legal requirements for a formal board of directors, and the word "Executive" is used for an Executive Committee, a governance subset of the Board. This board membership should be in the same manner as the non-incorporated Conference board unless specifically required otherwise by state nonprofit etc., laws.

(7/30/2020) Q: Do all new programs of a Conference have to be approved by the Council or can a Conference Board approve new programs, without the approval of Council? I ask this question because in the Governance: Council and Board handbook it reads, "No program should be allowed to start without Board approval. This includes both those started by Vincentians and those started by employees."

A: For most Conferences (those using Bylaws document 1), the Board of Directors of the Council (if no formal Board of Directors exists, then the Council itself) is the governing body and should give formal approval of new programs within the Council. The term "Board" is sometimes used informally among Conference members to refer to the slate of officers. Conferences generally do not have Boards. The handbook does not use the word that way. The handbook refers formally to the Board of Directors.

For some Conferences that are separately incorporated (those using Bylaws document 2), the Conference is the governing body and does not require Council approval for its programs. The bylaws define the governance responsibilities.

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(7/30/2020) Q: Does a Conference have to have Insurance if the Parish/Church has it? My understanding is that each Conference must have Insurance as well as the Council.

A: If the parish has liability and Directors/Officers insurance that covers the Conference, then it is not necessary for the Conference to have that coverage separately. But, that is something that has to be confirmed, as many Dioceses and Parishes are dropping the Society and other independent groups from their coverage each term. Some such coverage only covers activities that are conducted in the Parish grounds, so Home Visits may not be covered. The Council may acquire the appropriate liability and D&O coverage and include its Conferences. If neither condition exists, the Conference still has an obligation to have coverage. The National Group Insurance program is designed for this, but only covers Conferences doing traditional SVdP work. It does not include property coverage or any work that is considered non-traditional such as a meal program. If you need assistance, please contact Lockton Affinity, LLC at 844-307-5964. This is a dedicated line for the St. Vincent de Paul Program. If you need more than what they provide, they can usually refer you to appropriate coverage providers.

(8/13/2020) Q: I was told by my Conference that we do not help people with rent if they are on Section 8. Is this true and if so, why not?

A: 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. There is no authorization that prevents us from providing rental assistance to people living in Section 8 housing.

(8/20/2020) Q: I have a couple of new active Conference members whose husbands want to help when needed. Are they required to attend Ozanam Orientation within one year of joining?

A: All Active Members must attend an Ozanam Orientation within a year of joining the Conference. Associate members, which would be the membership category of the spouses you are referencing, are not required to attend. Although not required of Associates, the Ozanam Orientation may influence them to become Active members. The Ozanam Orientation and Serving in Hope are the primary training programs for Vincentians. Both emphasize the importance of spirituality. However, anyone serving regardless of membership is to take appropriate Vulnerable Youth/Adult training as required by your Diocese.

(8/20/2020) Q: It is my understanding that the Society defines “twinning” as: an arrangement between Conference A to send a specific amount of money each month to Conference B, which has need of additional income on a regular basis; is this correct? If so, what do we call it when one Conference provides another Conference assistance for a friend in need on a one-time basis?

A: The specific definition you gave for twinning is reasonable; however, it is not limited to monthly contributions or to any specific amounts. Twinning qualifies anytime one Conference or Council sends money to another Conference or Council to help the Conference do its works. For example, if you send \$500 to another Conference to help them in whatever way they determine, that is

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twinning. In the case of giving money to another Conference to help in a particular case, that would qualify as aid to a friend in need (a co-pay) because you are helping an individual even though it is through another Conference. In this case, it would be appropriate for you to have a case record for the person or family helped.

(8/27/2020) Q: Can Conference officers consist of the President-elect, Secretary, and Treasurer only, if no member accepts the Vice President appointment?

A: Conference officers (an elected President who appoints a Vice President(s), Secretary, and Treasurer) have no specific authority other than representation of the Conference and requirement to fulfill specific tasks. All decisions are made by the Active Members of the Conference as a whole. According to the bylaws there must be at least one Vice President, hence a member should step forward to serve as VP for a complete slate of officers. The Conference as well as the Council needs to know who will serve in the Presidential capacity should the elected President be unable to serve for any reason.

(8/27/2020) Q: In the rare circumstance that the President is unavailable to run a meeting, is the Conference lay-Spiritual Advisor permitted to run the meeting?

A: The bylaws read that, if the President is unable to attend or preside at any meeting of the Conference, this privilege and duty may be delegated to the Vice President or any officer. The Spiritual Advisor provides the necessary guidance to the Conference and its members on spiritual matters. Although appointed by the President, the Spiritual Advisor is not an officer and therefore should not be permitted to run a meeting.

(9/10/2020) Q: Our Conference received some McDonald's stock a few years ago, and we would now like to convert this stock to cash. How do we do this?

A: Stock received by a Conference can be converted to cash. However, members should obtain financial advice related to how to handle this process. You may contact the National Council CFO, Nancy Pino (npino@svdpusa.org) on stock conversion guidance.

(9/10/2020) Q: Are we prohibited from offering scholarships when the funds are there?

A: It all depends on the recipient of the intended scholarship. Scholarships to an elementary or high school would be improper because education is free in all communities and our position is that there is no added purpose in serving the poor by paying to attend school. If the scholarship is for a needy college student, that would be considered a possibility and a valid undertaking because college is not offered at no charge.

(10/1/2020) Q: Is it appropriate for a parish priest to ask our Conference for funds to pay parish expenses in this COVID-19 environment? We think another Conference has already done so. We are acutely aware of the Rule in this regard.

A: 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 and even during these unprecedented COVID-19 times. This includes the local parish.

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However, there are some Conferences that pay the parish a monthly stipend or fee for use of the parish facilities, such as meeting space, pantry space, utilities, etc. These are valid expenditures that do not fall into the category of donations to outside organizations.

(10/1/2020) Q: I know that spirituality, service and friendship are the essential elements of the Society. Is service to our friends in need the most important of the three?

A: The ultimate goal of our existence is to grow in holiness and spend eternity with God; so spirituality is our highest goal in all things. That being said, 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 essential elements of the Society. Like a three-legged stool all are needed for good balance.

(10/8/2020) Q: During this Coronavirus pandemic we are not doing any Home Visits with our friends in need. How do we keep track of our phone interviews? Where should we enter the hours we spend and the number of people we help over the phone? Sometimes it is a referral, counseling or sometimes we are paying a bill.

A: Phone interviews in place of Home Visits are now conducted across the country due to the Coronavirus and should be reported in the same manner as you would a Home Visit, except that phone interviews should be entered under Other In-Person Visits on the Conference annual report.

(10/8/2020) Q: Can a Deacon serve as chair for the Council's Voice of the Poor committee?

A: The VOP is a committee, and committees can be headed by a deacon. There is nothing that prevents a deacon from being a committee chair. Being the chair does not give the deacon a vote related to the board or Council. A deacon who is the committee chair can vote on committee matters since committees do not make final decisions and only serve in an advisory capacity.

(10/22/2020) Q: How long can a person hold the office of interim president? I have searched "The Rule" and cannot find this topic mentioned.

A: When a president resigns or is no longer able to fulfill his/her presidency, the vice president assumes the role as 'interim president' until an election is held. The election should be held as soon as possible as prescribed in the bylaws under Extraordinary Circumstances.

(10/29/2020) Q: A Conference president resigned after serving only two months. Another president was elected and served the remaining 10 months, and subsequently served another three year term. Is that same president permitted to preside for another term?

A: Yes, the president in office is eligible to serve a second term. However his first term should have been 10 months the first year and two subsequent years. Please refer to your Conference bylaws, as stated under heading, Extraordinary Circumstances, "The newly elected President's term of office begins on the date of election to that position and installation occurs at the next corporation board meeting or on October 1 of that year, whichever is first. If the term begins prior to October 1, irrespective of the months involved, the period of time prior to October 1 is counted as the first year with the remaining two years of a three-year term of office beginning October 1 of that year."

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(10/29/2020) Q: How do we report the number of people helped with cash i.e. rent, electric etc.? The Conference annual report has blocks for in-kind activity but not cash.

A: Expenses gathered under the treasurer's report reflects all funds expended for goods and services provided to those we served. The principal method for payment of aid will be check, paid directly to the provider of those goods or services. This also includes the cost of food purchased to stock your food pantry, gift certificates and gift cards. For those Conferences that operate stores and other Special Works, this includes dollars spent for direct aid to those in need. It is never recommended to give cash to an individual or family. There is no way to account for this properly and the Conference must have records of ALL income and expenses.

(11/5/2020) Q: There are a few Conferences and some Councils that run Special Works. Most, but not all, are stores. There seems to be a lack of understanding concerning the proper roles and responsibilities between those Special Works and the Conference or Council that owns or operates them. For example, sometimes a store committee believes it has complete autonomy to make every decision without input from or oversight by the Conference or Council. Can you clarify how this relationship should work?

A: A Special Work is a SVdP service, program, or thrift store owned and governed by a Council or Conference and operated by members and/or paid staff. It is not self-governed, and any decision must be made with oversight and approval by its owner, either a Conference or Council. A Special Work is devoted to a special location and people resources all year around; otherwise, it is considered a project. The relationship between a Council/Conference and its Special Works should exist with the understanding that any Special Work of the Society must ultimately be under the governance of a Council or a Conference.

(11/5/2020) Q: In our Conference meetings, we have had several discussions regarding how we refer to those we serve. Members are divided on the issue. Some say referring to those we serve as "client" is humiliating. Others say we should call them "friends in need." What is the appropriate way to refer to those we serve?

A: The Society suggests members refrain from using the word "client" to describe or refer to those we serve. The word client makes us an agency, and the Society is not an agency. We are person-to-person assistance to anyone in need. Those we serve are our neighbors (or friends) in need. The term "client" has been contrary to the culture of the Society throughout, and a conscious effort by members must be made to refrain from the use of such impoverishing terminology.

Frédéric often prayed and reflected on the Gospel story of the Good Samaritan, and the question posed by Jesus captured his heart: "Which of these three, in your opinion, was neighbor to the man who fell in with the robbers?" The answer came, "The one who treated him with compassion." Jesus said to him, "Then go and do the same." This is what drove Frédéric and the founding members to go out to those living in poverty to bring Christ's love and compassion to their neighbors. Today, we hold this grace in our hearts as we are called to serve our friends and neighbors, never thinking of them as or calling them "clients."

(11/12/2020) Q: During this Coronavirus pandemic we are not doing any Home Visits with our friends in need. How do we keep track of our phone interviews? Where should we enter the

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hours we spend and the number of people we help over the phone, sometimes it is a referral, counseling or sometimes we are paying a bill?

A: Phone interviews in place of Home Visits are now being done across the country due to the Coronavirus and should be reported in the same manner as you would a Home Visit, except phone interviews should be entered under Other In-Person Visits on the Conference Annual Report.

(11/12/2020) Q: Does a Vincentian who is an active member of two Conferences have voting rights in each Conference? Is his/her membership counted twice in the Annual Report? If so, where is the citing that relates to this?

A: Yes, his/her membership should be counted twice in the annual report. Although allowed, it is not often that one person is a member of more than one Conference so duplication of numbers is not significant. There is nothing written to cite this practice, hence we must therefore go by the Rule and how it defines an active member.

(11/19/2020) Q: A recently deceased member of our Conference bequeathed a large donation to us. No decision has been made yet on how to use this donation. Is this hoarding?

A: Donors typically give funds to the Society to help those in need. Some bequest instruments have specific donor intentions, and these should be followed whenever possible. Holding the funds in an interest-bearing account is NOT a violation of the Rule unless the Conference makes decisions not to help individuals in favor of earning interest in the bank. Then it becomes hoarding. Not making a decision on how to use the funds leads to hoarding. Unless specified otherwise, donors expect the funds to be spent in helping people in need as soon as practical.

The National Council recommends that Conferences consult with their next higher Council in accordance with the Rule, Part III Statute 24. It is appropriate to make a plan to use the money in a limited time period, such as 5 years. If the funds exceed the need of the Conference in the established time period, Conferences should consider using funds to support other Conferences less fortunate through domestic and international twinning, or perhaps helping with our national Disaster Services projects.

(11/19/2020) Q: Do I get a vote as president? A member said that according to Robert's Rules of Order I cannot vote. I have searched the By-laws and all the various handbooks I can find no reference.

A: The president is a voting member of the Conference. Traditionally, the president withholds his/her vote unless there is a tie. This is a tradition and not an enforceable rule. Please remember that the Society whenever possible uses a consensus model and not Robert's Rules for governing our meetings.

(11/25/2020) Q: Because of current circumstances, attendance at meetings (conducted on Zoom, by email, or outside) has been reduced to about half of our active members. Can Conference hold proxy or email voting?

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A: Meetings with quorum can be held in-person indoors with proper social distancing, on Zoom (Google Meet, etc.), in-person outside with proper social distancing, and by telephone conference call, but not by email. Email can be used for communication but not for meetings. Voting by proxy is not allowed in Conferences. Voting by email is not allowed unless for a specific case with approval decided at a prior meeting by the members. If email voting has been approved for a particular case, email votes should be sent only to the secretary for proper recording.

(12/3/2020) Q: What is the importance of sustainability when it comes to helping our neighbors in need? Should sustainability be questioned or sidelined during this period of financial uncertainty?

A: Although sustainability is what we hope to achieve with those we serve, it is not the goal of the Society and not questioned. It is our role to love those in need in the best way possible. Sometimes we help people now because it is the right thing to do, even if it means they will come back to us next week.

(12/10/2020) Q: During COVID19, can email communications be counted as holding Conference meetings?

A: Meetings can be held in-person indoors with proper social distancing, on Zoom (Google Meet, etc.), in-person outside with proper social distancing, by telephone conference call, but not by email. Email can be used for communication but not for meetings.

(12/17/2020) Q: Is there any SVdP policy statement or position that addresses a Vincentian member's "private" donation of food, clothes, or money to a neighbor being served? That is, a donation action that would not first come before the Conference members?

A: Conference members must understand that the works of the members are works of the Conference. This is not a Conference member's personal charity. No member should give their own money to someone the Conference is serving without being reimbursed by the Conference. The same holds true if the member goes out and purchases something with their own money to give to a person in need. In addition, if the decision of what should be given to the person in need was made specifically by the Conference and the member doesn't agree and wants to do more, then the member is dishonoring the other members of the Conference by doing more.

(12/23/2020) Q: Do Conferences have the choice to either join their Council 501c3 tax exemption option or apply for their own?

A: It is up to the Council to decide which option they will use to make sure their Conferences are tax exempt. All of the forms and instructions for the three options can be found at <http://www.svdpusa.org/members/Documents/501-c-3>. Email Sherry Brown at sbrown@svdpusa.org for additional questions.

(1/7/2021) Q: We recently received a company-matching gift from a member's spouse who is a non-member. Under what category do we record this contribution?

A: Company matching gifts should be reported under other income, whether the company's employee is a Conference member or not.

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(1/7/2021) Q: While doing our Home Visits by phone, more and more rent requests have included utilities. Is this providing assistance twice? In our Conference, a separate budget is used for each. Our board members receive a monthly report of all we have helped; rent and utility assistance shown separately as having helped X amount of families with utilities and Y amount of families with rent.

A: In response to your inquiry, the new annual report form asks for a separate total for housing, under Expenses, line 7 Housing Assistance/Eviction Prevention. So, keeping separate stats is appropriate. However, there is no reporting line for utility assistance. That would simply be included with the other monetary assistance; which is line 6 Those We Serve.

(1/14/2021) Q: A member volunteering at our food pantry recently said that we could not talk politics although volunteers discuss many topics. This only happens when there are no visitors at the food shelf. In my opinion, this is suppression of free speech. Is there a rule that says discussing politics or any other during Conference work forbidden?

A: There is nothing in the Rule against free speech. We can discuss issues, but not candidates. Nonprofits can campaign for or against legislation. We must keep in mind that any discussion related to candidates for political office must be outside any SVdP activity. Otherwise, it may be determined that such discussion by Vincentians is in the name of the Society, which is improper. It is a long-standing tradition going back to our founders that we are not to discuss politics within the Society except as how we may advocate for those we serve.

As Blessed Frédéric Ozanam said at his last address to the General Assembly of the Society in December 1848, just after a very contentious French election, “As we enter our Conferences, we leave political passions at the door: we are assembled, not to fight each other, not to tear each other apart, but to get along, to see each other’s good side ... When every morning twenty newspapers are busy stirring up our anger, it is good that at least once a week we can calm it down by talking about the poor.”

(1/14/2021) Q: A non-SVdP agency in our community helps with utilities, rent, food, and other assistance. They are very helpful to our Conference. We have extra funds in our account and would like to give them a donation. Is this permissible?

A: 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. Our donors chose to give to us for our own services, not to send those resources to others. Collaboration with outside resources, however, and attempts not to duplicate services, are encouraged. To honor donors’ intentions, the IRS does not authorize donated funds to be a pass-through from one nonprofit to another nonprofit.

(01/21/2021) Q: How do we determine a quorum? We have 17 active members, but only 7-10 are attending meetings regularly. I am able to get some input from those who are not attending but obviously, they are not voting in person.

A: The nationally recommended model bylaws on the national website describes a quorum as a majority of the active Conference members. It is defined as 50% of active members plus

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one. Remember, an active member is someone who regularly attends meetings. From the specifics of the question, only 7-10 are actually active members. If, for example, there are 10 active members regularly attending meetings, then the quorum is six. If the number of active members changes, the quorum changes. Further, do not confuse a quorum with a majority needed for certain decisions as required in your bylaws. If there is no quorum the Conference can still meet, they just cannot pass any resolutions.

(1/28/2021) Q: Are we still keeping records on those friends "that we cannot help" due to low or no funds on hand at time of their need? Do we report these numbers in some fashion?

A: Case records should be made whether we help an individual or not. A Home Visit may still offer spiritual and emotional support even if no funds are provided. Although the Conference may not be able to help financially at the point in time asked, a need may arise in future weeks or months. If so, there is a file already established and may or may not require some updates. The visit should be recorded on the annual report. Many visits do not include giving funds, but a visit was made and thus should be counted.

(2/4/2021) Q: Is there some guidance about saying that a financial review by another Conference is all that is required, not by an expensive audit firm?

A: For Conferences with no stores or special works, the informal Conference audit using the Conference Audit Manual and Worksheets can be used. It is found in [Governance-in-a-Box](#) under Additional Resources.

For Diocesan Councils, District Councils and Conferences with Stores and or other special works, a formal audit is the specification. A simple, informal audit for these structures has not been established. These are too complex. If you are receiving grant funds, the funder usually requires a formal audit. Determine this before applying for funds so that the audit costs can be included in the total program/project costs.

(2/4/2021) Q: We are in receipt of some Community Development Block Grants (CDBG) focused on housing assistance. As a couple of these are city-specific, we are working with specific Conferences for the distribution of these grant funds to support our neighbors in need with rental, mortgage, and utility assistance in those cities. These grants are all contracts with the District Council and are reimbursable, based on quarterly submission of demand forms/reports. My question relates to how these funds are reported by the Conference as we do not want to double-report. And are there any special considerations as to how the Council would report this?

A: The Council would receive the funds and report the income. The Council would then twin the funds to the Conferences as the paperwork comes through. The Conferences would report the income as "Other SVdP Contributions." The Conferences would have to do the appropriate reporting to the Council and the Council to the grantor.

(2/11/2021) Q: Should our secretary and treasurer be logging their administration hours for our reports?

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A: All hours associated with the Conference should be reported – not just direct service. This includes service hours by all officers.

(2/18/2021) Q: We just recently voted on a new set of bylaws. When exactly do those bylaws go into effect?

A: Unless there is some specification defined in the vote, the bylaws go into effect immediately. The national expectation is that a new set of bylaws is adopted each time the nationally approved bylaws are revised.

At Midyear 2018 National Council bylaws were revised, and at Midyear 2019 Conference, District and Diocesan Council model bylaws were revised. To see the current applicable bylaws, click here and scroll down to the bylaws tab: <https://www.svdpusa.org/members/Documents/Governance-in-A-Box>.

(2/25/2021) Q: 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?

A: There is no conflict. Part I is the International Rule. Part III of the Rule is associated with the Society in the United States. In accordance with Part 1, our National Council consulted with our nation's Bishops. The Bishops asked that we adopt the current policy of not having non-Catholic officers to assure that our faith and its values would not be lost among collaborative efforts while performing our work with people of other faiths, without concerns of becoming a secular organization.

(3/11/2021) Q: One of my Conference Presidents asked about the legitimacy of using a Gofundme page to help raise money for neighbors in need who have such financial needs that even the combined efforts of our three county agencies cannot meet them. What is the National Council's position on this approach?

A: Crowdsourcing can be an effective social media form of raising funds for general Conference and Council projects and start-ups. National Council recommends that if used, you promote it through other social and traditional media, driving potential donors to the site. It is rarely successful without this added promotion.

The National Council asks our Councils and Conferences to refrain from creating crowdfunding resources directly for our friends in need. There are two reasons for this.

First, our Vincentian tradition is to have a caring relationship with our friends in poverty, not simply a transactional fund clearinghouse relationship. Most people can develop their own crowdfunding pages if they wish. We could view these as exploitative of their current financial status and other deficits; in other words, such an appeal is based on being judgmental.

Second, we ask people to fund the Society and trust its members to make fair, loving decisions on how, and how much, to assist those in our communities who need our help. Let us remember that at the core of our mission is the formation of the Vincentian! This cannot be replaced by a transaction. Furthermore, it pits the "story" of one person or family against another, competing for crowdsource

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funds, which in our view is demeaning and unfair. The Society is not a social service agency, nor is it an advertising arm for our neighbors in need. Our mission is about neighbors directly serving neighbors.

As an important aside, crowdsourcing funds given to the Society for its use and decisions are tax-deductible. Such funds given through the Society for specific families are not deductible, as the true recipient is not the Society but the person/family in need. We may not re-assign our tax-exempt status to these recipients.

Crowdsourcing is not inherently a bad thing. Persons in need may use crowdsourcing themselves and still avail themselves of the Society's Home Visits and other available services. They may already do so, just as they may have other resources, and we do not inquire about it. People come to us as they are, and we use collected funds from our donors to assist, as we are able.

(3/18/2021) Q: Who is the official spokesperson for the Society? Where will I find this in the Rule?

A: This is not specifically in The Rule, it is found in the National Council Resolution 5, dated Sept 1, 2006. The National President is the only spokesperson of the Society on national issues. The President may elect to delegate this responsibility to another Board member and/or Executive Director, especially in times of crisis communications."

In the old Manual is a statement under the duties of the Council President to "make the work of the Society known." It specified 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."

(3/25/2021) Q: Our Conferences have been very blessed with many contributions and fewer Home Visits, so they have fairly significant cash balances. They want to be true to our Rule to not hoard funds so are looking at other ways to help the poor. They know that the Rule prohibits donating funds to non-Vincentian organizations. Is it permissible for them to purchase tangible goods (e.g. food for a community pantry, or clothing for a homeless shelter) and donate those goods to another charitable organization?

A: The simple answer is: No. It is important to recognize the spirit behind our Rule. Our primary purpose is growing spiritually; that guides how we live out our friendship and service. For that reason, our service is *person-to-person*. Our encounter with Christ in the person of the poor we serve contributes to our spiritual growth. True Vincentian service is more than "checkbook charity." Buying goods like food or clothing and then passing that merchandise to another charitable organization is essentially the same as writing them a check. It disconnects us from a person-to-person encounter with Christ in the friends in need we serve. Moreover, our donors gave us funds for the Society's use, not to pass to other organizations. If they wished to donate to that organization, they would have.

It is permissible, on an exceptional basis, to donate goods that have been donated to us, and which are surplus to our ability to distribute, to other organizations. Examples might be perishables that

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would go to waste if not promptly distributed or quantities of items beyond a Conference's ability to handle by turning them over to a third organization so long as the donor approves.

Another exception is a structured collaborative service with other organizations – like a homeless shelter. Typically, these have a legal Memorandum of Understanding that spells out the roles and responsibilities of each organization and how the service will be funded. Vincentians are involved in person-to-person service and in the overall administration and governance of the collaborative organization. In these cases, shared funding is permitted.

If Conferences or Councils have accumulated an unusual surplus of funds, there are many options to put those to use in direct Vincentian service through the Society. These include:

- If your Conferences use guidelines that limit the frequency or amount of aid to any one individual or family, eliminate those guidelines. We should treat each case on its own merits, looking at help needed and Conference resources available at the time, without limitations.
- Twinning:
 - with Conferences in your district or diocese that have greater needs than they can meet;
 - with needy Conferences or Councils in your Region (contact the National VP for your region);
 - with international Conferences (contact the National office);
- Donate to Disaster Services Corporation:

<https://www.svdpcdisaster.org/civicism/contribute/transact?reset=1&id=1>

Donate to the National Council:

<https://interland3.donorperfect.net/weblink/weblink.aspx?name=E135450&id=21>

(Apr 1, 2021) Q: Can you provide examples of Vincentian assistance that may be considered as "Other In-Person Visits"?

A: Other In-Person Visits includes anytime you meet someone at a location other than their home; for example, meeting someone at the parish office or your Conference pantry. Another example is when someone calls in need of gasoline, and you meet them at the gas station. You may meet someone at a neutral site who calls for help and lives in an area of heavy crime. During the pandemic, telephone, zoom, or other like interviews are considered Other In-Person Visits.

(Apr 1, 2021) Q: To what extent to a Conference does the Rule Part 1, 7.6 apply, if at all? Our thinking is that this Rule would most likely apply at the Council and National level. If not, what are some examples of how Conferences might abide by the spirit of this Rule?

A: 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 levels. Members are encouraged to participate in VOP. Individual members can join VoterVoice and advocate on behalf of the people they serve by making contacts to legislators. To sign up to join VoterVoice [click here](#). Our National President regularly informs our members of opportunities we should take advantage of to speak for the poor. Councils should inform their members of like opportunities at state and local level.

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For state and local advocacy information, click here to view the National Council VOP toolkit: <https://www.svdpusa.org/vop-tools> or contact Tom Mulloy, National Director of Poverty Programs, tmulloy@svdpusa.org.

(4/8/2021) Q: A Vincentian at one of our Conferences wants to leave the Society in their Will or Trust. What info do we provide them?

A: This is such good news! Please thank them profusely, and provide them with the following verbiage and information:

"I hereby give, devise and bequeath to **[legal title, tax ID # and address]** or its successor thereto, [specific amount, percentage of the estate, residual (remaining) or description of property].

1. The required information is:
2. Your Conference or Council **Tax ID #**.
3. The current **address** of your Conference or Council.

If someone chooses to name the National Council as a contingent charitable beneficiary or outright, here is the required info:

- Legal Title: **National Council of the United States, Society of St. Vincent de Paul**
- Tax ID #: **13-5562 362**
- Address: **66 Progress Parkway, Maryland Heights, MO 63043**

Click here for more information: <https://ssvpusa.org/planned-giving/> or email: Dennis Kempf, Director of Philanthropy at dkempf@svdpusa.org

(4/15/2021) Q: Where is it stated that an active member MUST attend regular Conference meetings. Article 5 of our Bylaws is not specific with details.

A: Article 5 is a replication of the Rule, Part III, Statute 3. Briefly, an Active Member is Catholic, attends meetings regularly, and participates in Conference works and activities. 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.

(4/22/2021) Q: In the Rule, I cannot find anything related to the termination of an officer for non-performance. Can you direct me to Vincentian materials that relate to this problem?

A: 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 may remove a member, Conference, or Council from the Society. There are some Conferences in the country under special conditions who have chosen to follow a policy of electing all of the officers.

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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.

(4/29/2021) Q: Why are memorial donations to be categorized as “Fundraising” as opposed to being listed as “Other Income” on the Annual Report?

A: Memorial donations could fit into either “Fundraising” or “Other.” The difference depends on solicitation. If you specifically solicit the memorial donations, then it is fundraising. If you receive them as a byproduct of someone else's solicitation or no solicitation, then it is simply other income.

Q (5/20/21) Does National provide special instructions for Conferences filling out their annual 990 to be sent to IRS?

A: The National Council does not provide tax guidance, or 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. Most Conferences qualify for either the 990-N or 990-EZ. Filing an IRS 990 (990-N if your revenue is less than \$50,000), annually is the only requirement to maintain your tax-exempt status. Form 990-N is due every year by the 15th day of the 5th month after the close of your tax year. Only Councils and rare Conferences that have complex structures, facilities and services generally fill out the full 990 form.

(6/3/2021) Q: Does a family receiving long-term assistance from a Conference have to report it as income on their taxes?

A: No. SVdP does not provide IRS forms to those whom we serve for tax reporting purpose. The provision of the form does not dictate the law.

(6/10/2021) Q: What Society membership status is assigned to a Deacon?

A: Priests and Deacons are not prohibited from being members of the Society. The Rule Part III Statute 5 states that they cannot hold any leadership office other than Spiritual Advisor. The membership type that should be selected for Deacons and Priests of the Society is an Associate member.

(6/17/2021) Q: Can a Vincentian be an active member of the two Conferences? If so, what additional information should the Conferences be made aware of? What resource references this?

A: Yes, a Vincentian can hold membership at two Conferences. No additional info needed for either Conference to be made aware of. As a courtesy, the member should disclose this information to both. There is nothing written; we must therefore go by the Rule and how it defines an active member. Although allowed, it is not often that one person is a member of more than one Conference, so duplication of membership numbers is not significant.

(6/17/2021) Q: Can a member of two Conferences have voting rights in both Conferences? Should his/her membership be counted twice on the annual reports?

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A: Yes, the Rule says an active member has one vote in a Conference. An active member of two separate Conferences are eligible to vote in each of the Conferences of which they serve as a member. The member should also be counted on each Conference annual report.

(6/24/2021 Q: Many of our members are experiencing the unexpected death of loved ones during the pandemic. When Conferences learn of the death of a Vincentian's loved one due to any cause, members wish to express condolences. One way to do this is to send a card provided by various Catholic religious centers with a donation for a Mass included. Should members take a collection among themselves for this purpose or write a check from Conference funds?

A: The Conference members should take up a collection and pay for the Mass cards or have the Mass said at the parish. Many Conferences have their secret collection held aside and not included with Conference funds for just such occasions as this.

(7/1/2021) Q: I am struggling with a decision made by our Conference. I disagree with it. How do I deal with this?

A: Members make Conference decisions as a whole through either consensus or vote. Once the decision is made, all members must abide by the decision whether they agree with it or not. The Rule. Part III Statute 16 states, "To ensure democracy in the Society decisions are often made by consensus. Consensus decision-making requires that everyone agree with a decision, not just a majority as occurs in majority-rule processes. In consensus-based processes people must work together to develop an agreement that is good enough, though not necessarily perfect. In rare circumstances, if consensus cannot be reached the decision may be put to a vote.

All decisions made by a Conference or Council must be made consistent with the Rule and Statutes of the Society, Articles of Incorporation, Bylaws and governance policies of the Society."

(7/8/2021) Q: Can Conferences assist our neighbors in need with delinquent payments on their telephone/cell phones?

A: There are no official policy guidelines set by the Society for providing assistance with whatever is needed. We seek to assist people who need help and provide compassionate aid to the needy regardless of their circumstances. For example, phones may be necessary to pay bills, stay in contact with employer and family, or apply for a better job.

Limiting the types of service we provide does not correspond with the Rule. Part 1:1.3 of the Rule states, "No work of charity is foreign to the Society. It includes any form of help that alleviates suffering or deprivation and promotes human dignity and personal integrity in all their dimensions."

(7/15/2021) Q: Is it okay for members to carry a concealed weapon while doing Society work, specifically while working at SVdP Thrift Stores?

A: We follow state laws first. In most states, an employer can set its own policies for both employees and customers, so long as they post the rules, against possession of guns or weapons.

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Most retailers agree that employees with any weapon is not a good idea, unless it is a vital part of their official duties such as for security personnel.

(7/15/2021) Error! Bookmark not defined.Q: We have a well-stocked pantry, thanks to our generous parish. The pantry manager insists upon and throws out everything one week before the ‘use buy date’ shown on all food items. Is this acceptable practice?

A: The pantry is a special works of the Conference. Conference members are the pantry decision makers and should establish operation guidelines. However, we must abide by local health regulations. This includes regulations on any use/distribution of food in relation to its Sell by/Use by dates.

(7/22/2021) Q: Our Conference has operated as an Isolated Conference for decades. A District Council is forming in the diocese. Is there a choice to remain as an isolated Conference?

A: Isolated Conferences within an established District Council must join to remain in full compliance with proper SVdP Governance established by the National Council. Resolution 169 reads, “Any Conference located within the established boundary of a District Council shall all join that District Council.”

(7/22/2021) Q: What is the policy for entering high crime neighborhoods for Home Visits?

A: The general response is, 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.

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 dignity of the poor. 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.”

(7/29/2021) Q: Can the parish pay the salary for someone who heads a special work, for example, a food pantry?

A: If the parish is paying someone to lead a special work, then it becomes the special work of the parish, not the Conference. To maintain our Society’s independence, the parish may make a designated contribution to the Conference for special works salaries. This can be accepted or not by the Society. If accepted, the employer is the Society and not the parish.

(8/5/2021) Q: What does SVdP stand for?

A: “SVdP” is the acronym for St. Vincent de Paul in the U.S. In Europe and many other countries and at the international headquarters in Paris the acronym used is SSVP.

(8/12/2021) Q: Thrift Store personnel believe they are separate and not controlled by the Council, is this true?

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A: Within the Society, no Thrift Store or Special Works can be standalone; they fall within the authority of the SVdP entity that created them. Thrift Stores, even if they have their own EIN, are not and cannot be separate from the authority of the Council or Conference that formed them. Store employees may report to a specific director and in some cases a “Store Board of Directors” but that director and Board are still under the authority of the formation Conference or Council.

(8/12/2021) Q: Can a Youth serve as secretary of an adult Conference?

A: There are no age restrictions as far as the officers are concerned. Obviously, you would want an adult as Treasurer. Everything depends on how comfortable the members are with a Youth as Secretary. However, keep in mind that the Youth must be an Active Member of the Conference to be eligible to be an officer.

(8/19/2021) Q: What process does the Society take to endorse any legislative efforts? Does the Board vote; is an executive decision made, or any other formal process?

A: The National Voice of the Poor Committee’s position is that the Society can endorse legislation but not candidates. The local VOP committee may identify legislation that members should support or not through consensus. National/federal legislation is considered by the National VOP committee and the National President. Such positions are then communicated to our membership, often with Voter Voice sample support messages for everyone’s use.

(8/19/2021) Q: Are St. Vincent Thrift Store employees voting members at the local Conference?

A: Thrift store employees can vote at Conference meetings only if the store employee is also an active Conference member. The Nationally Approved Bylaws for Conferences say that each Active Member of a Conference has one vote and that vote must be cast in person. Store employees should abstain from voting on issues that relate to their employment. Employees are not allowed to be Society officers at any level but they may be members.

(9/2/2021) Q: Can an Associate Member go on a Home Visit with an active member and participate in deciding what assistance should be provided to the neighbor in need after the visit?

A: Where possible, decisions on the assistance to provide after a Home Visit is made by active Conference members. There are Conferences that allow associate members to do Home Visits: sometimes two associates, sometimes an associate with an active member. Conferences normally allow the decision for help to be made by the visiting team – period. The challenge with two associates doing the visit is to assure reporting back to the full Conference, and also them not knowing about previous discussions related to the person or family visited, and related monetary limits that take place at the meetings.

(9/2/2021) Q: Our Conference decided to establish a SVdP phone line without messaging services. We can be reached on Mondays 9:00 AM - 11:00 AM only. Is this practice okay? What, if any, are the ramifications of this practice? What do you think of this practice?

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A: The ramification of this practice is that our friends in need have nowhere to turn to if the Conference can only be reached at the hours indicated. We recommend installing a separate phone line with messaging services to serve our friends in need. The messaging technology often allows for SVdP members to allocate return calls among members, and for them to have some helpful details for preparedness prior to the call.

(9/9/2021) Q: Can a neighbor in need served also become an Active Member of a Conference?

A: A neighbor can indeed become an Active Member of a Conference so long as the requirements for an active member are met: 1) They are Catholic; 2) They attend meetings regularly; 3) They participate in the activities, works, and life of the Conference. All three are important to be an Active Member. If #1 or #2 is missing, they are Associate Members. The Rule, Part III, Statute 3 identifies clearly the membership types. Experience shows that it is best to accept them into membership after their situation stabilizes.

(9/9/2021) Q: Can a Conference organize around the ethnicity of its members?

A: We have many Conferences throughout the country that are focused on language spoken: Spanish, Korean, Vietnamese, etc. These are sometimes ethnic based, but should never exclude anyone who wishes to join and serve. All are welcome!

(9/23/2021) Q: Our Council is encouraging our Conferences to incorporate because our liability insurance policy (through the national program) does not cover non-owned vehicles with low limits, nor abuse/assault coverage. Our legal counsel recommends we incorporate to protect the Conference members from any personal liability. We are exploring this option. Does National approve of this consideration?

A: If the Conference incorporates, they are legally independent of the Council but still affiliated with the Council and reports to the Council. The incorporation will give protection assuming you purchase insurance with the proper liability coverage. Also, once separately incorporated, the Conference will have its own EIN and must get its own 501(c)(3) directly from the IRS. With its own tax-exemption comes the responsibility to file their own 990 each year. This needs to be clarified before moving forward. Do NOT make assumptions; get answers.

(9/23/2021) Q: I was just elected President of my Conference. Is there any training available?

A: In addition to whatever your local Council may offer, there are two upcoming webinars designed for Conference Presidents by the National Task Force on leadership. [The Seven Duties of a Conference President](#) on September 30, and [The Five Goals of a Conference President](#) on October 7. Click the links to read more and to register to attend.

(9/30/2021)

Q: Our Conference was formed with three parishes into one at the pastor's request because the priest was the same in all three parishes. We are a strong Conference with lots of good works. The President is asking if another parish five miles down the road that has its own priest can join us? I have asked him to start their own Conference. Can we allow another parish to join in just because they want to?

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A: Multi-parish Conferences are perfectly acceptable, and can even be advantageous, as you can draw on a larger pool of parishioners for members and officers and increase your donor base. Building on to the foundation of an existing strong Conference is certainly easier than starting a new Conference. Since the neighboring parish has its own pastor, you need to get the permission of that pastor, as you'll want to raise funds there, communicate the Society's works in their bulletin, and do an annual Invitation to Serve pulpit appeal for members. Appoint a Conference VP from that parish, and over time, ensure a good balance of officers from all parishes. Consider rotating meeting locations so it is easy for all to attend. You might consider the new parish as a "startup" process toward building their own Conference as soon as stabilized leaders and resources allow.

(10/7/2021) Q: What are the consequences if a Conference refuses to make home visits?

A: No consequences are imposed. However, as Council leaders we must continue to encourage and advocate the fact that home visits are what makes us unique and unlike other charitable organizations. The Rule, Part III, Statute 8 clearly states: "Visits to those in need should be made in their environment." We recognize that personal safety, COVID and other local factors may make such visits at times difficult to achieve. There are also some Conferences organized as Special Works conferences. Leaders are asked to do their best to help members grow in spirituality through the experience of our basic Home Visit, conducted as "close to the customer" as possible.

(10/7/2021) Q: Is the Society okay with Conferences using their Archdiocese parishes revolving accounts (PRF) instead of savings accounts?

A: PRF accounts are acceptable if they are not comingled with parish funds, SVdP has sole access to the funds, and the funds are accessible immediately. These sorts of agreements are rare; often the Pastor has funds access. Therefore, such accounts must be viewed with great scrutiny and backed up with strong documentation.

(11/4/2021) Q: How are gift card purchases or gift certificates for food reported on the annual report?

A: Gift cards or gift certificates purchased by Conferences for food should be reported as expenses in the annual report under "those we serve" since the expenditures are on behalf of neighbors in need. Gift cards or gift certificates that have been donated to the Conference are treated as in-kind and are reported as they are used.

(11/4/2021) Q: Is it correct that we should not use a friend in need's name and picture in our advertising - even with their permission?

A: Using the name and photograph of our friends in need on advertisement is not a violation, with written (authorization) advance permission. We want to be sensitive to a person's situation, including financial, family, and safety. There are additional sensitivities when dealing with the identities of children. Many SVdP Councils/Conferences have case record forms that have a disclaimer on it; perhaps it will work for this purpose. Others have a separate release of information form for our friends in need to sign. The release of information form is different from a release to use

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images/photos and normally does not include permission for photographs or advertisements. There is usually a separate release form for this purpose. Contact the National Communications Team, Jill Pioter (jpioter@svdpusa.org) or Michelle Boyer (mboyer@svdpusa.org) about this. A question to ask is if the real name is truly needed: can you tell the story with an alias? Could you use only a first name and have the same impact? The critical point here is the picture, whether you use their real name or an alias. Many people do not want their pictures shown.

(11/11/2021) Q: Are two members of the same family allowed to serve as officers in a Conference?

A: In the Rule, Part III, Statute 12, the last sentence reads: "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." However, if they are not related to the President, a couple may serve as officers (i.e. Vice President and Secretary) in the same Conference or Council.

(11/11/2021) Q: Does a family receiving long-term assistance from a Conference have to report it as income on their taxes?

A: No, there is no IRS income filing requirement for charity received. It is a gift, not income. SVdP does not provide IRS forms to those whom we serve for tax reporting purpose.

(11/18/2021) Q: Conference Bylaws, Document 1, indicates Conferences should meet at least twice a month. The standardized Conference and Annual Reports have a possible meeting time of once a month. Please confirm, or not, that if a Conference meets once a month they are not in compliance with the standardized Bylaws, document 1? Also, if a Conference meets less than once a month, what should be the selection on the Annual Report, "Other?"

A: "Monthly" and "Other" are on the Annual Report for Conferences to be honest in when they meet. However, the Rule (Part III, Statute 5) is also emphasized in the bylaws. It is up to the Conference to be compliant with the Rule. It is the responsibility of the Conference President to ensure this. It is the responsibility of the District Council to ensure that all Conferences are compliant with the Rule. Any action related to bringing the Conferences into compliance must be initiated by the Conference President and the District Council. If this is ignored by the Conference President and the District Council, then the Conference, the Conference President, and the District Council are all non-compliant with the Rule. In that case, upper Councils must take action when they know this condition exists. Refusal to be compliant with the Rule is grounds for removal from the Society.

(11/18/2021) Q: How do we report the number of people helped with cash i.e. rent, electric etc.? There is a reporting section for in-kind activity but not cash.

A: The number of people helped with cash is not captured on the Annual Report separately, but is reflected in our Visits and Services to People which includes in-kind services. As described in the Annual Report instructions, expenses gathered under the treasurer's report reflect all funds expended for goods and services provided to those we served, including cash, checks, certificates, bus tickets, and gift cards. The principal method for payment of aid will be check, paid directly to the provider of those goods or services. This also includes the cost of food purchased to stock your food

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pantry. For those Conferences that operate stores and other Special Works, this includes dollars spent for direct aid to those in need.

(11/25/2021) Q: We are an agency of Second Harvest. We have held two mobile pantries, one serving 250 families and the other 200. Should we report this in the "in-kind food" column? We also give out food every third Thursday that is provided by Second Harvest. We average 35 families. We have just started this a few months ago. Please advise if/how we would report this on the Annual Report. Not sure if I could be accurate on the value.

A: Unless you have a special arrangement with Second Harvest, the food you get from Second Harvest is purchased, so it is not in-kind. When you say that you "also give out food every third Thursday that is provided by Second Harvest," do you mean that Second Harvest is doing the distribution and you are helping, or that Second Harvest gives you the food free of charge and you are distributing? If it is the first, then you don't record anything except your time. If it is the second, then you record the food distributed as in-kind.

(11/25/2021) Q: I have a real problem with the ethnicity breakdown requested on the Annual Conference Report. The federal government has a special form for Ethnicity and Race Identification. I see no value in providing this information.

A: The Society does not use this information in any discriminatory way. The ethnicity information is collected only in the aggregate. 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 and inclusive the Society has become. Occasionally, there are questions related to this from major funders.

(Dec 2 2021) Q: Some Conference members purchase Christmas gifts with their personal funds, which they deliver, along with a member of their family. Is this allowed?

A: Vincentians should refrain from providing help using their own personal resources, especially since those we serve will view the assistance as being provided by SVdP. This is permitted as long as it is done in the individual member's names – not in the name of SVdP – and there would be no reimbursement in this case. Many Conferences throughout the country have Christmas Tree or Adopt-A-Family programs. The connection is for parishioners to provide gifts for the families. Members and their families may also participate in these programs.

(12/9/2021) Q: Our Council gets funds donated to us from a couple of grocery chains. The funds are then passed on to the Conferences in the form of gift cards, which they either give to people or use to purchase food for their pantry. How should the Conference report these funds on the annual report?

A: The financial report is only for actual money that is deposited in the Conference accounts. Gift cards cannot be deposited and must be included under in-kind.

If your food pantry is designated as an official Special Work for which you send in a report at the end of the year, then the money donated to the food pantry should be entered on line 3A. If the food pantry is not an official special work, then the money donated for food should go into Restricted Funds. But again, this never includes gift cards because they are in-kind donations.

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A: Vincentians should refrain from providing help using their own personal resources, especially since those we serve will view the assistance as being provided by SVdP. This is permitted as long as it is done in the individual member's names – not in the name of SVdP – and there would be no reimbursement in this case. Many Conferences throughout the country have Christmas Tree or Adopt-A-Family programs. The connection is for parishioners to provide gifts for the families. Members and their families may also participate in these programs.

(12/16/2021) Q: The LDS church has contacted our Conference offering volunteers to help with our service. I know there are major doctrine differences, so would like to know how SVdP responds to such a request.

A: Members of the LDS church (as well as others) can be Associate Members, meaning they can participate in the works and possibly attend meetings (without a vote), but they cannot be officers. If your Conference has special works, such as a pantry or a store, they can assist as volunteers. If your Conference has special seasonal programs such as Thanksgiving or Christmas, they can help then as well.

(12/23/2021) Q: We currently have two individuals who have been working and volunteering in our Thrift Store for years. Is it against the law to have an individual as both an employee and volunteer?

A: Once a person is hired to do a job, he/she must be paid to do that job. They are not allowed to do that job for pay sometime and for no pay (volunteer) sometime; it is against labor laws. A person may volunteer to do work that is totally unrelated to the work he/she is paid to do. For example, a store employee may work as a cashier and be paid for it. Then that person may volunteer to sort clothing, but may not do anything in the cashier's job description.

(1/6/2022) Q: A few members of my Conference say that they will not help someone who lies to them. Pope Francis has said that someone who lies is desperate. I believe that we should assist someone in need even if they have lied to us. Yes, confront the lie but show mercy. Is there anything in the Rule or other Vincentian literature that addresses this situation?

A: People lie for various reasons: some out of desperation, some because it suits the way they live, some simply because it will gain something for them. Telling lies is sinful, which means that a liar is a sinner just like all of us. God is willing to forgive all sinners; should we not be willing to do as much?

In the Rule, Part I, Articles 1.8 it states, Vincentians serve the poor cheerfully, listening to them and respecting their wishes, helping them to feel and recover their own dignity, for we are all created in God's image. In the poor, they see the suffering Christ. Members observe the utmost confidentiality in the provision of material and any other type of support. Article 1.9 reads, Vincentians endeavor to establish relationships based on trust and friendship.

Conscious of their own frailty and weakness, their hearts beat with the heartbeat of the poor. They do not judge those they serve. Rather, they seek to understand them as they would a brother or sister.

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When we interview someone who is asking for help, it is up to us to do due diligence to determine if the need is real and if we should help. Was the lie a determining factor if giving the assistance? If the lie was not a determining factor in deciding what to do, then does it really make a difference on future help? Should we Vincentians have done more investigation before agreeing to assist? Sometimes in our willingness to help people, we don't do all we should to ensure the need is real.

(1/6/2022) Q: Is there anything in the Rule or Manual that would prevent an individual to serve as President of both his/her District Council and President of his/her individual Conference simultaneously? If so, could an individual hold different offices within the Council and Conference? i.e., Council President, Conference Treasurer?

A: It is not a problem from the Rule and Bylaws for a Council President to also carry the office of Conference President. Nonetheless, it is not recommended because of the responsibilities including voting that go with each position.

The following circumstances should be clearly addressed and determined by the Council before allowing one individual to serve in both elected roles:

- 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.

(1/13/2022) Q: If you have a pantry in your Conference, are you allowed to change the shopping list? For example, in the past a family of 6+ could receive 10 canned goods and then it was reduced to eight; plus, other items were also reduced on the sheet?

A: This is a local issue to be addressed by local leaders. However, the reality is that when you are providing food to individuals, you want the meals to be nutritious and well-balanced; and it doesn't hurt to customize the manner in which food is given to families in need. Otherwise, it is a matter of resources, budgets, and fairness.

(1/20/2022) Q: At the national meeting there were papers on the relationship of pastors and Conferences, Extension/Revitalization team roles and responsibilities, and the Extension and Formation Initiative Revitalization Toolbox. Where can I find these on the website? I looked at several different places and could not find them.

A: Here is the link for Growth & Revitalization materials: [Outreach – St. Vincent de Paul USA Member Site \(ssvpusa.org\)](https://ssvpusa.org), where you will find all the materials available from the National Council.

(1/27/2022) Q: Next year the Diocesan Council will be billed for solidarity based on the number of active Conferences reported for the 10/1/2020-9/30/2021 fiscal year, when two absorbed Conferences were still active. Is the Diocesan Council responsible for absorbing the solidarity dues for these now inactive Conferences?

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A: When the new method of solidarity calculation went into effect in 2013, it was a specific decision that the invoice would go to the Diocesan Council (or District Council if no Diocesan Council exists). It is up to each Diocesan Council to determine how the invoice will be paid. For example, some Councils pay the whole amount as support for their subsidiaries, while others are reimbursed by their Conferences and Special Works. However, the full payment is expected to be paid by the Council, even if the number of Conferences or Special Works has changed since the reporting period.

(2/3/2022) Q: One of our Vincentians has asked if our Conference can spend funds to improve the poor boxes in our parish church. We receive the contents of the boxes each week. They've gotten a little shabby, and our pastor has been working on improving the church's environment with new pews, new stations, etc. Is this allowed?

A: Since the funds from the poor box are given to SVdP, the Conference may purchase replacements for the poor boxes and treat it as operating expenses. However, the Conference may not contribute funds directly to the parish to do so.

(2/10/2022) Q: The philosophy of the Conference to which I belong is to help people get over an emergency situation, not to offer continual ongoing support. Is this a correct position for a Conference to take in dealing with people who come to us with needs? Our philosophy is not related to our not having sufficient funds to help.

A: The Society of St. Vincent de Paul does NOT help “in emergencies only” or “only once each year.” It is the philosophy of the Society to “treat each case on its own merit.” It has nothing to do with how often a person or family comes to us for help. It has everything to do with whether or not the need is real, and if we have resources to help. It has everything to do with compassion toward those in need and sharing God’s love with those seeking help. It has everything to do with finding Jesus in the face of the poor. If your Conference has any limitations in your guidelines which prevent you from helping people, consider removing them. Our guidelines should be emphasizing how we can help people – not turn them away.

(2/17/2022) Q: We have a separately incorporated store who is choosing to operate independently from the Council. What do we need to consider in discussing this with them?

A: Every effort must be made to recover the members and store operation. The following are considerations related to what might occur.

- All entities of the Society operating within a Council area are subject to the authority of that Council regardless of whether or not they are independently incorporated.
- The authority of the Council is recognized and acknowledged by the Council General International when the Council was instituted.
- Failure of the store or special work to recognize that authority is grounds for that entity to be removed from the Society. This does not give the store or special work authority to continue in operation outside of the Society. The assets of the store or special work were acquired under the name of the Society and, therefore, the store or special work must be dissolved and the assets returned to the Society.
- In some cases, actions may warrant formal removal of some members from the Society.

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Possible outcomes are not absolute; every effort must be made to reconcile and recover.

(2/17/2022) Q: Is there anything in the Rule that covers discussions of those we serve via email? What about sending mail to spouses who are not both Vincentians but share an email address?

A: Confidentiality is highly emphasized within the Society. The Rule does not address technology and it shouldn't since technology changes and improves constantly. 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 those we serve. So, email may be used to discuss information about those we serve 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 people we serve, 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.

(2/24/2022) Q: When our Conference visitors come across a neighbor in need who has put the utility bill in one of their children's names, should we pay it? Putting the account in a child's name may be considered fraud, but for some families this may be the only way to have electric and gas service. Do we ignore this "crime" and keep the lights and heat on? I think we should assist. Is there a good reason why the Society should not assist?

A: This is a local decision, but if the request to pay is made by the person who lives at the address aligned with the bill, it is okay to pay it. Don't do account verification work the utility company should have done.

(2/24/2022) Q: Can a person be registered in one parish and belong to a SVdP Conference of another parish?

A: Yes, a person can be registered in one parish and belong to a SVdP Conference at another. The Rule does not require Vincentian members to belong to the parish in which they worship.

(3/10/2022) Q: Our Council is considering updating our salary ranges for our management staff. Is it acceptable for us to simply call around to other SVdP's or other organizations to find out what salary ranges are reasonable for our area?

A: Councils/Conferences should never discuss employee wages or benefits with other SVdP's or other organizations. There are a few non-profit compensation surveys out there. We recommend using third parties to complete compensation surveys for SVdP employees.

Most employers outsource compensation surveys because of anti-trust/price-fixing laws that have serious legal and criminal risk if not handled properly. Employers are advised to seek legal advice.

The National Council HR Director has researched this issue and the full DOJ guidance to HR Professionals on anti-trust considerations in compensation planning is linked [here](#).

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These considerations apply to non-profit employers as well as private for-profit employers alike.

It may not be objectively illegal for SVdP Councils/Conferences to conduct wage surveys but can entail a lot of risks.

There is nothing to stop Councils/Conferences from conducting their own market analysis or looking around for other rates to ensure your salaries are competitive. For example, looking at public job postings or BLS data or other online sources and deciding to increase paid time off is no major issue. It's when you start talking to other SVdP entities or interacting with them about pay that, things can get risky. Again, this can be a criminal issue rather than the usual employment law stuff that's more financial in risk.

(3/24/2022) Q: Is it necessary for the Treasurer to keep hard copy statements if banks now have electronic records available and easily accessible? Is it necessary to store electronic copies of these statements?

A: It is the responsibility of the Treasurer to reconcile all bank statements. That can be done with a hard copy of the statement or with an electronic copy. The Treasurer should keep copies of the statements, either hard copy or electronic, for the seven years and then destroy them as specified in the Manual. These files must be transferred to each new Treasurer who takes office.

(3/24/2022) Q: The Treasurer's Manual recommends that we keep copies of donor checks. If our bank stores electronic copies of checks that are deposited to the account, are hard copies necessary? We have a Conference concerned about having the donor's banking info and keeping that information confidential - is that a valid concern?

A: So long as checks and deposits are accessible through the bank, there is no need to keep them. The confidentiality issue is not a concern if the Treasurer is following proper precautions. It is the Treasurer's responsibility to ensure proper security of Conference financials.

(3/31/2022) Q: Some Conferences use computers for everything. If all records are kept electronically, which ones MUST be stored as hard copies also? For example, meeting minutes? Case records? Is it necessary for the Secretary to sign the meeting minutes (print, sign, scan, store)?

A: All records identified for permanent storage in the Manual should be maintained in hardcopy (as well as electronic, if possible). All other files are considered temporary (limited by time) and may be electronic.

(3/31/2022) Q: Many Conferences in our Council now use ServWare for case management. If all case records are stored in a Customer Management System and the recommendation is to destroy case history after 3 years, are we required to do that?

A: Yes, record retention is defined not only to save storage space but to eliminate information that no longer has meaning.

(4/7/2022) Q: Can paid staff Executive Directors (EDs)/CEOs be members of a board? Can they be officers of a board - such as a store board?

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A: Paid people cannot be officers at any level in the Society. Board members are not officers; therefore, Executive Directors/CEOs may be ex-officio, non-voting members of the Board of Directors. However, an ED/CEO who is paid by a Council/Conference other than the Council/Conference represented by the Board of Directors in question, may be a voting member of that Board. For example, Member A is an ED for Council A and has been asked to sit on the Board of Council B. Member A can be a voting member of Council B's Board, but not an officer. This can be found in the nationally approved bylaws under BOARD OF DIRECTORS SECTION.

(4/7/2022) Q: A person contacted our Conference recently and wants to give us a check for \$1,000 to help his daughter to pay her rent. We were told that we could not accept donations like this. Can you explain?

A: This normally happens when someone would like to help a family member but would like to get a tax deduction as well; so, they decide to go through a nonprofit like SVdP to accomplish this. According to IRS, any time a donation is made to a nonprofit organization that is specified for an individual, it is considered to be a gift to that individual and is not tax deductible. No Conference should accept such a person-designated donation.

(4/14/2022) Q: Are we supposed to delete all history from ServWare that is more than three years old to avoid too much paperwork or to give a fresh start after three years?

A: When it comes to case records, it is good to know a little history, but going back beyond three years may not be necessary. Even for those we help routinely, we really don't need to know beyond three years. If we go back too far, it could be that we are looking for a way to say "no" rather than say "yes." All things considered; this is a local decision.

(4/14/2022) Q: Are there any general guidelines on interviewing our friends in need? Is there a guide for interviewers on Do's or questions not to ask?

A: Guidance for Home Visits and interviews can be found in two new books on the website: Vincentian Life: Conference and Vincentian Life: Member. These files may be found on the National Council's website Leadership tab under the category of Basics About Conferences. [Click here.](#)

(4/21/2022) Q: What process, i.e., Board voting, Executive decision, etc., does the Society take to endorse any legislative efforts?

A: The National Voice of the Poor Committee identifies legislation that affects the Society and the people we serve. The Committee takes into account the positions held by other Catholic organizations as well: USCCB, Catholic Charities, etc. The VOP Committee makes recommendations to the National President about what legislation to support or not. The President is free to confer with others. Only the National President can speak for the Society in the USA. Local legislative concerns follow the same process under the local Diocesan President.

(4/28/2022) Q: Do we need to put the non-discrimination policy in the Bylaws or keep it with other policies such as the Conflict-of-Interest policy?

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A: Conferences must define the non-discrimination policy and include it in the bylaws. The Non-Discrimination Policy is found on the national website. [Click here](#). Also check with local legal counsel to be sure it is valid for your state and local government requirements.

(4/28/2022) Q: Our Conference (Conference A) has been requested by a friend in need to provide payment for their motel stay. They are located in Conference B's area. We contacted Conference B and were told by the President that they helped this family with one week's stay at the motel. No red flags were indicated. Conference A told Conference B that they told the family one week was all they were getting, and they would not receive assistance from our Conference (Conference A). Is this proper?

A: When encountering someone requesting help who lives in another Conference's (Conference B) boundaries, it is appropriate and common courtesy to contact the other Conference to seek advice and any cautions they may want to share. It is then up to your Conference (Conference A) to decide what you will or will not do in the way of assistance. Conference B cannot speak for you or direct you about what kind of help to give or not give. It is your Conference's decision on if, when, and how much to help those who come to you.

(5/5/2022) Q: If a Conference is working to help an individual and is lacking all the funds to do so, can members raise money for this purpose?

A: Yes, the Conference can raise such funds (for this purpose), but in a special way. When soliciting funds for this purpose, a reference should be made to help individuals like this one; but no indication should be made that the fundraising will be earmarked for a specific individual.

Conferences must be very careful that those who contribute to this cause do not specify any individual or family's name with the donation. They may specify for rent or utilities or whatever purpose as an appropriate general category. If the name of the individual is specified, the donation becomes a gift and is not tax-deductible. It also restricts the Conference's giving to the named person. In some cases, more is raised than needed, while others still have needs that the Conference can't help with those donor-restricted funds.

(5/5/2022 Q: Is there a difference between a Conference paying rent to a "regular" landlord and paying rent for someone who is living in group home for addiction recovery or is this giving money to another organization which is against the Rule?

A: This is not a violation of the Rule. It is not a contribution to another organization. You are paying someone's rent and need to create a case record for each rental payment. The fact that the landlord is a non-profit has no bearing on assisting the neighbor in need.

(5/12/2022) Q: For transparency, should capital campaign funds being held by a thrift store for a future building project be included on the annual report and carried over each year, or only in the year that funds are collected?

A: Only the capital campaign funds received during the year are reported. The Council or Conference that owns and operates the store reports the fund balance from the end of the prior year in its beginning balance on its report.

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(5/12/2022) Q: Two Conferences pooled their funds and wrote a check to a third non-profit who then paid a motel for two weeks for a neighbor in need. Does the Rule support this transaction?

A: Yes. What you describe is not a donation to a non-profit. It is a valid co-pay, and the Conferences should record this in their case records.

(5/19/2022) Q: How important is it to get a receipt for rental payments? Most landlords send receipts, but some do not. Is an electronic copy of the check from our bank a sufficient record of the transaction?

A: Every effort should be made to get a receipt. If not possible, a note from the Vincentians involved with the transaction saying that the receipt was not given should be used in place of the receipt. This should also be recorded in the case record.

(5/19/2022) Q: In the Rule and Manual it talks about receiving a plenary indulgence at festival meetings. How do you define a festival meeting, and could a Morning of Reflection be considered as such?

A: The Manual is explicit about what are considered festival meetings. According to Society's tradition, Vincentians celebrate "Festival Meetings," which is gathering for Mass and a meeting on one or more of the following: Ozanam Sunday (the last Sunday of April, in honor of the April 23 birthday of Frederic Ozanam), the Feast of Blessed Frederic Ozanam (September 9), the Feast of St. Vincent de Paul (Sept. 27), the Feast of the Immaculate Conception (Dec. 8), and the Feast of Blessed Rosalie Rendu (Feb. 7).

Members may gain a plenary indulgence on the day of their admission to the Society, and when participating in a Festival Meeting, provided they make their Confession, receive Communion, pray for the intentions of the Pope, and promise to observe faithfully the Rule of the Society.

(5/26/2022) Q: Can the Society pay for training/education for an individual employee with an agreement that the employee would need to be employed (retained) by the Society for a defined period because we paid for the training?

A: This is a legitimate employee benefit (to be offered); however, it should be defined and approved as a formal policy related to employee benefits. Care should be taken to ensure that the defined employee retention period (as an employee) is legal in your state, appropriate for the benefit provided and not excessive.

(5/26/2022) Q: Our Conference serves neighbors in need with HIV/AIDS on a regular basis and has done so for many years. We do not put them into our database for obvious reasons. Should we report these neighbors the way we have in the past as just hours without declaring the amount of help given?

A: It is assumed that the assistance provided is the same as for anyone else. Case records should be created as is done for any other neighbor and with the financial assistance recorded. Health information is not required nor recommended to be in anyone's files. If Conference members are visiting as shut-ins or hospital visits, then the visits should be recorded as such.

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(6-2-2022) Q: I have a couple of new members that want to help when needed. Are they required to attend Ozanam Orientation within one year of joining?

A: All Active Members must attend an Ozanam Orientation within a year of joining the Conference. Associate Members, which would be the membership category you are describing, are not required, but are encouraged to attend. The Ozanam Orientation and Serving in Hope are the primary training programs for Vincentians. Other volunteers may benefit from these as well as they discern their own service and faith paths.

(6 2 2022) Q: Are we required to assist someone in need who is belligerent and difficult to work with — for example, a person who refuses to give information about income and expenses or about others in the household?

A: Although this is a local decision, as Vincentians we should explain to our neighbors that this is necessary for our assessment of their need. If they don't want to cooperate, then the Conference should decide if help should/will be given. Also, the Conference should be sure the information they are requesting is truly necessary to fulfill the assessment for the assistance requested.

(6/9/2022) Q: Can you help me explain the reason for the 60-day expiration on the release form we have people we serve sign when providing assistance?

A: The reason for the 60-day expiration on the release form is to assist us with gathering information about the neighbor we are serving. The form is not designed to retain information gathered forever; it is to be used only to assess the request for assistance needed at the time the request is made.

(6/16/2022) Q: Our newly elected president has resigned. I was the former president. Since I was elected to the diocesan president position before I completed my term, can I assume the position again? We do not have anyone interested in being president at this time. Our vice president is willing to take over until we find another person to be president. Can I take over as president or do we have to have a formal election?

A: The vice president assumes the office until a formal election for president of the Conference is held. You can be a candidate only if you are eligible to be elected again, depending on how long since you last served. If you have already served two terms as Conference president, you will have to wait until you've been out of office for three years; otherwise, you can be elected again. Serious consideration should also be given about holding two president positions at the same time. It is better for voting matters and to develop others as leaders if they are held by different members.

(6/16/2022) Q: Can a husband and wife belong to the same Conference?

A: Husbands and wives can indeed belong to the same Conference. This is not against the Rule. As Vincentians, we are encouraged to increase membership by extending an invitation to our family members to join. It is against the Rule, however, for a husband and wife to both serve as officers together.

(6/23/2022) Q: Resolution 169 states that if there are three or more Conferences located within a reasonable geographic distance of each other, those Conferences shall join

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together to form a District Council. Can you tell me what is a reasonable geographic distance to require an isolated Conference to join a District Council?

A: In the past, the gauge for this used to be about two hours of driving time since it was to gather for District meetings. But since the pandemic, District meetings can be held in-person, virtually, or a combination. So, this limitation is no longer a concern. If there are at least three Conferences, Isolated or not, within a Diocese we strongly encourage all Isolated Conferences to create and/or join a Council.

(6/30/2022) Q: How much information on those we serve are we permitted to share with other organizations? Can we share our Home Visit reports?

A: Confidentiality is extremely important in the Society. It is a violation to share information of those whom we serve with other organizations unless a written and signed waiver authorization is received from those served.

(6/30/2022) Q: Is it against the Rule to give someone in need a ride? If not, are Conference members who do so liable if an injury occurs?

A: It is not against the Rule; however, two Vincentians must be present and the Vincentian (driver) giving the ride should be licensed and insured. This needs to be written into your Council/Conference Safeguarding policy. If this service is an official SVdP program, it needs to be addressed one way or another in the Society's insurance coverage. Don't wait for an incident to ask about it!

(7/14/2022) Q: Our parish is giving us some generous space in the bulletin every week to get our message out. Some relatively new, but very effective, Vincentians have suggested that we publish our monthly statistics: how many individuals and families helped, etc. They also want to publish how much we spend on our assistance every month. Do we have a rule that governs this?

A: It has been a recommendation of the Society for Conferences to give a summary of their activity to the pastor and the parish at least annually. Using the bulletin to do this is appropriate. Providing such detailed assistance information more than four times a year is usually too much. The space may be better used by having regular bulletin announcements about the Society.

Here is the website link to SVdP bulletin announcements for every week of the year:

<https://members.ssvpusa.org/formation/formation-resources/bulletin-announcements/>.

(7/14/2022) Q: 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 to whom we give food. Is this a violation of confidentiality?

A: 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.

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Some food banks accept, as an alternative, a list of people not by name or other specific identifiers, but by demographic group and zip code. See if this would be acceptable.

(7/21/2022) Q: Should members of the Conference be permitted to perform services for which they are compensated by a neighbor who is being helped by the Conference?

A: Members of the Society should not accept compensation from those we serve for the works that we do as Vincentians. What we provide in the way of resources and our time is a gift to those in need. No payment is to be accepted.

Vincentian connections are not proper to make business solicitations for work done outside of the Society. Otherwise, nothing prohibits a Vincentian from conducting their usual business services for someone who receives Society services. We do not restrain trade; however, there should be a clear distinction between what is provided as Society service (at no cost to those receiving the services) and what may be done as a contractor, etc.

(7/21/2022) Q: Our Conference is assisting a neighbor who has someone once a week to help with laundry and housework. The helper is paid \$22/hour. The neighbor is not happy with the job this person is doing and would like to find someone else to do the work. Discussing the situation at our Conference meeting, one of our members offered to help this neighbor. The member wants to be paid for her services. Is this something that is permitted within the Conference?

A: In the above Q&A, we indicated that members should not be paid for work they do as Vincentians. However, in this case, the member is effectively being employed by the person the Conference serves. If the member continues to receive payment for services from the person served by the Conference, then the member must withdraw from participating in any way with the Conference in evaluating requests from that person.

(7/28/2022) Q: Am I correct, that we should not use a friend in need's name and picture in our advertising — even with their permission?

A: Using name and likeness of our friends in need on advertisements is not a violation, so long as written authorization has been given to do so. Many SVdP Councils/Conferences have case record forms with a disclaimer on it that may work for this purpose; others have a separate release of information and photo usage form for our friends in need to sign. Be sure you are consistent with your Council's and Diocese Safeguarding policies in this regard. We recommend not using photos of children in need; stock photos are acceptable and help with safeguarding protections.

(7/28/2022) Q: If a Catholic attends meetings but has no contact with the poor, are they an Active 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 neighbors in need, so they are serving the poor. The majority of the Conference wants them classified as Active Members for fear of losing the donation from their company. Your thoughts?

A: To summarize, The Rule, Part III, Statute 3, an Active Member is Catholic, attends meetings on a regular basis and participates in the works of the Conference. Make every effort to get this person

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involved in the works of the Conference in some way; it does not need to be with direct contact. 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 considerations.

(8/4/2022) Q: If the church parking lot or drive needs to be paved, do we need to have a special fundraiser or request a special donation, or can it be covered by our regular funds?

A: According to our Rule, the Society does not give funds to outside organizations (including the church). We do not perform fundraising activities for outside organizations either. Individual members may contribute personally to the church fundraiser, but not as the Society.

(8/11/2022) Q: It is my understanding that only presidents of aggregated Conferences can be voting members of a District Council. Is this correct?

A: The Rule, Part III, Statute 10 specifies that District Councils represent a minimum of three, and ideally a maximum 12 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. In the nationally approved bylaws for District Councils, there is no specification that affiliated Conferences must be aggregated to be voting members of the District Council. However, it is highly recommended that Conferences get aggregated as soon as they are eligible (after one year of service).

(8/18/2022) Q: I understand that an Executive Director (ED) is an ex-officio member of all standing committees. Is he also an automatic member of the Board of directors and entitled to attend any meeting (including Executive board meetings)?

A: In the Bylaws, The CEO/ED is normally included as a non-voting Board Member and officer. As such, the CEO/ED is also included in the Executive Committee. However, if part of a Board meeting is to discuss matters related specifically to the CEO/ED's performance or review, then the Board or Executive Committee may go into Executive Session, which would only include voting Board Members.

(8/18/2022) Q: One Board member who is limited in personal income has asked to be compensated for his time spent working on computer/printer needs. He did not ask to be paid for the camera he volunteered to install. Should we reimburse this member for work which previously was either done voluntarily or was done without bringing a request for compensation to the board in advance for approval?

A: Not if there was no clear expectation in advance by both parties that compensation was necessary for the work to be done. Within SVdP, members should be reimbursed for expenses they incur when doing SVdP work, but they should not be expected to be paid for their time unless there was a prior agreement in place.

(8/25/2022) Q: We have a situation with a Conference working with an individual who is "cheating the system" to get more help. Would it be wise for them to report this to the police or just let it go?

A: One of the categories in our non-discrimination statement is "criminal justice status." We also are concerned about the safety of children and vulnerable adults. If the suspicion of "cheating the system" is serious enough then it should be reported, as a matter of conscience.

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(8/25/2022) Q: When two meetings are held in the month — can the Reflection be omitted from one of the meetings to shorten the length of the meeting? I always believed having a Reflection item on the agenda was a necessary item in all meetings.

A: All meetings must incorporate spirituality, fellowship, and service. While it could take several forms of varying lengths, some element of Spirituality must be included in every meeting agenda.

(9/15/2022) Q: We help with shoes and uniform clothing for a very poor school. We were told we shouldn't help since we are helping a private inner-city school. Many are homeless with no shoes or winter coats. We do not assist with school tuition or any other school funding issues; we are helping the children. Is this acceptable?

A: If you give the shoes and clothing individually, directly to those who need it, it can be recorded as an individual case and it would be valid. If this is extra clothing that cannot otherwise be used, then it is ok. However, if clothing is purchased specifically for the need given to the children, then it is a donation prohibited according to the Rule, Statute 26. We do not do checkbook charity — we are to be involved in person-to-person works.

(9/22/2022) Q: We recently elected a new President, and now have a new Treasurer. The previous Treasurer did not think the Treasurer should sign checks. She would make them out but another member, who is authorized at the bank, would sign it. The new Treasurer thinks that it is ok for him to sign checks as long as someone else approves/authorizes the payment. Is it appropriate for Conference Treasurer's to sign checks?

A: Yes, it is normal practice throughout the country for Conference and Council Treasurers to be signers on all of the accounts. A good number of all Conferences throughout the country require all checks to be written and signed by the Treasurer.

(9/22/2022) Q: Our Conference was approached by another organization to discuss collaboration work with their payday loan alternative program. This organization is interested in creating a pooled fund to be used as collateral for payday alternative loans. Vincentian money would go into this fund for neighbors in need. It would not be a donation to the other organization but commingled with the other organizations' (and potentially others) money. Is this type of arrangement permissible?

A: The funds used for this purpose would have to be collected specifically for this purpose. They could not use normal Conference funds for this purpose.

Second, the funds could be co-mingled if SVdP maintained control over its funds. If not, then this is a donation to an outside organization which is prohibited.

Many Councils have invested funds into resources that contain co-mingled funds from many organizations. However, SVdP maintains full control over its funds in those vehicles.

(9/29/2022) Q: With thousands of people facing eviction, homelessness is an increasing scenario. Does the Society of St. Vincent de Paul have an actual definition for homelessness?

A: The Society does not have a single, standard definition of 'homelessness.' Instead, we have a Position Paper adopted by the National Council that articulates a Vincentian response to the problem in our nation and communities: <https://members.ssvpusa.org/download/112/the-vincentian-position-position-papers/1217/homelessness.pdf>.

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(9/29/2022) Q: Are there rules about the amount of funds that can be carried from one year to the next?

A: It is the intent of the Society (and its donors) that the money be spent to help those in need. Carrying funds over to the next year is not a problem as long as the intent is to spend the funds and not accumulate them in the bank.

(10/13/2022) Q: How are international disaster declarations handled and who issues them?

A: The [Commission for International Aid and Development \(CIAD\)](#) examines funding requests regarding projects undertaken worldwide by the Society, focusing on emergency relief in response to humanitarian crisis, disaster recovery, development programs, and projects aimed at expanding and strengthening the Society internationally. It is also responsible for monitoring the allocation of project-related funds around the world.

(10/13/2022) Q: At our National Council there are 128 votes that could be cast. Do you know approximately how many votes can be cast at our Council General International in Paris?

A: According to The Rule, Part II, the presidents of all instituted Superior (National) Councils or Assimilated Councils are voting members of the international Confederation. Assimilated Councils are lower-level Councils or Conferences that have been officially designated as representing the country in which they are located. We operate in 155 countries and potentially have 155 voting members. As is the case in the United States with our National Council members, even though 128 National Council Members are eligible to vote, they don't always attend the meetings because of various reasons.

(10/20/2022) Q: Does the Society have a policy related to investments that is based on moral objectives?

A: On April 23, 2016, the National Council approved Resolution 140 which identifies the criteria/process to be used in accepting donations and developing relationships. This also applies to making investments. This resolution may be found on the national website, [click here](#).

(10/27/2022) Q: Conference names must be religious in name and cannot be St. Vincent de Paul or Frédéric Ozanam. (I know I've seen this somewhere but cannot find it now.)

A: It's related to the application for Aggregation: You must choose the name of a saint (other than Vincent de Paul or Frédéric 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. St. Vincent de Paul and Blessed Frédéric Ozanam may be used only if that is the name of the parish.

(11/3/2022) Q: This is not officially in any of the Society's documents. When no one comes forward to run for Conference or Council President, should a Council President have the ability to appoint temporarily a Conference President or, in the case of a Diocesan Council, a District President to serve temporarily until an election can take place?

A: The National Governance Committee decided on the following:

1. It is the responsibility of SVdP leadership to make every effort to keep Conferences and Councils running.
2. The President of the next Council (or the National Vice President for the Region in the case of an (Arch)Diocesan Council) has the authority to appoint a temporary President of a Conference or Council until an election can take place.

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3. The temporary period should be four to six months, but flexibility should be a consideration when circumstances warrant.
4. In the case of a Conference, if no one comes forward after that period, the Conference should be dissolved on the basis that the members are not accepting their responsibilities as an SVdP Conference. In the case of a District Council, the Council should be dissolved, and the Conferences should be allocated to another District, or the Conferences may be dissolved on the basis that they are not accepting their responsibilities as SVdP Conferences. In the case of an (Arch)Diocesan Council, the National Vice President may recommend the dissolution of the Council. To be clear, voluntary dissolution of a Council or Conference may occur at any time. Forced dissolution of a Conference or Council must have the approval of the National President.

(11/10/2022) Q: Should Conferences pay tuition for Catholic school education since elementary and high-school education is free?

A: The National Governance Committee has recently reviewed and agreed to the following:

1. Helping a family make a tuition payment under the right circumstances can be justified.
2. Making a contribution from Conference funds to the parish or school to support the tuition-assistance program is prohibited by the Rule as a donation to an outside organization. Tuition payments are directed to benefit specific families.
3. There are a couple of appropriate conditions that the Committee identified: the case of a student needing to be removed from public school as a way to ensure his/her health and safety; and a case in which a student is already attending Catholic school, but the parents are having financial problems and it would be improper to force the child to attend a new school. These are not the only possible special conditions.
4. The Committee confirms this is actually a decision to be made by the Conference.
5. The Committee recommends that a possible alternative is to pay other bills for the family allowing them to pay the tuition.
6. The Committee also believes that Conferences need to have good advice related to this available to them.

(11/10/2022) Q: Since we paid rental assistance to some of our neighbors in need, their landlords may have received assistance from the government for the past due rent and therefore were paid twice. Can we get the landlords to refund the money?

A: That would be a requested arrangement made between the Conference and the landlord. The Conference made the payment in good faith. If the landlord gives the tenant future credit for the payment, that is all the Conference can ask.

(11/17/2022) Q: Our Council gets funds donated to us from a couple of grocery chains. The funds are then passed on to the Conferences in the form of gift cards, which they either give to people or use to purchase food for their pantry. How would these funds be listed by the Conferences?

A: The financial section of the annual report is for actual money that is deposited in the Conference accounts. Gift cards cannot be deposited and must be included under in-kind. If the food pantry is designated as an official SVdP Special Work and a Special Works report is submitted to the National Council at the end of the year, then the money donated to the food pantry should be entered on 3A of the Council report. If the food pantry is not an official special work, then

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the money donated for food should go into Restricted Funds. This does not include gift cards because they are in-kind donations.

(11/23/2022) Q: Can members use personal funds for payment of neighbor's utilities if the treasurer is not available to write a check to the utility company?

A: Vincentians should refrain from providing help using their own personal resources, especially since those we serve will view the assistance as being provided by SVdP. We are not a personal ministry for individuals; we are a group ministry, and members should treat the Conference as such. In extenuating circumstances, if no one is available from the Conference to issue the check, the member may do so from their funds if they are available. But the member must be reimbursed by the Conference as soon as possible. Remember, this is not a personal ministry. This is the work of the Conference.

11/23/2022) Q: Are volunteers who are not Active members considered to be Associate members? (We think yes, according to most bylaws versions).

A: That is true to a point. There are people who help the Society in order to get credit for community service hours, court-ordered hours, etc. These are strictly volunteers. Associate Members are those who buy into who we are and what we do without the fulfillment of an obligation. There are two categories of Members: Active and Associate. If you look at the Conference Annual Report, under Membership, it asks for the number of "Non-Vincentian Volunteers." There is a distinction. Volunteers are not Members and, therefore, not Vincentians

(12/1/2022) Q: By the Rule of the Society, the President of a Conference or a Council has a set term limit not to exceed two consecutive terms or six years. Is it reasonable to set term limits for the other officer positions (Vice President, Secretary, Treasurer) at all levels of the Society?

A: There was a discussion of this topic by the National Governance Committee which reflected differences of opinion related to the value of the term limits and the cautions against them. Although, under certain circumstances, there would be some advantage to term limits, there are also advantages to not having term limits for the other Officer positions. At this time, the National Governance Committee sees no reason to recommend any change to the current Rule. As it stands, a current Vice President, Secretary, or Treasurer may be appointed by a new President to continue on in their role for another term.

(12/8/2022) Q: I am currently Conference President and may have the opportunity to serve on the City Council in the near future. Will I have to resign my position as Conference President? Can I still be an active Vincentian? I am having trouble interpreting this part of The Rule, "Those members who hold political offices will be asked, always with charity, not to hold any mission of representation in the Society during their term of political office."

A: If your intent is to be on the City Council, then you should resign from your role as Conference President. You may remain an Active Vincentian. As President, you are considered the spokesperson for the Society and, therefore, any decisions you participate in the City Council can be taken as reflective of the Society. That is why the separation is sought.

(12/8/2022) Q: I have a store committee that wants to fundraise in the community, so they can have a Christmas party for employees and volunteers. It does not sound right to me, but I want to make sure that I am not being too conservative, and I say no to something that is not against any Rule or standards. I need guidance.

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A: The Society, including its stores is a not-for-profit organization. According to the IRS standards for such organizations, fundraising must be for charitable purposes. Any specific fundraising for an employee party fails to meet this standard. However, such staff events are a normal part of a charitable enterprise's business, so revenues earned from the thrift store may be used for an employee party. This should be a budgeted expense. Fundraising for the store in general, because the store serves a charitable purpose (likely many!) is appropriate, just not specifically for a staff party.

(12/15/2022) Q: I was advised by our President that it is not necessary to have a Vice President of the Conference. It was optional. Who then is responsible for handling the election of a new President?

A: It is required of every Conference to have a full slate of officers. This includes VP, Secretary, and Treasurer. Having multiple VPs is optional. In the temporary absence of a VP, or if the VP is considering a Presidential candidacy, the President may appoint another officer or member to head the nomination committee.

(12/15/2022) Q: One of our Conferences organizes a group of volunteers, some Vincentians and some not, to cook an evening meal once a month. Another Conference undertakes a "Christmas Giving Program" at its church whereby parishioners take a tag to donate a gift. The gifts are returned, and the Conference delivers the gifts to a community agency who will distribute them to the needy. There is no Vincentian visit with the ultimate recipients. How are these reported on the Conference annual reports?

A: These can be considered Vincentian activities but only the hours of the members should be recorded unless funds of the Conference are used to buy food or gifts; then the expenditures can be recorded, also. However, the donated items are not recorded because they are simply passed through to those doing the distribution. We have to be very careful in this, as we are prohibited from giving funds or other resources we purchase to outside organizations; we are also not allowed to fundraise on their behalf, either.

(12/22/2022) Q: We have a parishioner who works in our Conference pantry one day each month and does not want to join SVdP. Is he still covered under the Insurance policy?

A: The parishioner who works in the pantry one day each month, is considered to be an "associate" member of the Society. If you have liability insurance coverage, he/she is covered should a lawsuit be filed so long as the Rule is followed. For example, in Home Visits, the Rule requires Home Visits be made in pairs of two. Thus, if a claim were filed as a result of a Home Visit and only one Vincentian visited a neighbor, insurance may not cover the single Vincentian that visited the neighbor in need.

(1/5/2023) Q: Where can I find help to fill out my annual report?

A: Information on how to fill out your annual report can be found on the [Annual Report Forms page](#) of our member site. The Help Files section contains video links and a Q&A document to assist in filling out your annual reports. You can also view [tutorial videos](#) on how to access annual reports and [filling out the reports](#) on the SVdPUSA Vimeo channel. These tutorials and more can be found by logging into the Members Portal and clicking Need Help? in the left side navigation.

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(1/5/2023) Q: I have a Conference that has stocks that show a lesser value on their September 2022 statement (stock market correction) than on the September 2021 statement. How do I show that on the Conference report? Under 12. Other? As unrealized capital loss?

A: The annual report is based on cash receipts, and stock information should only be included if they are purchased. Stocks and Bonds have a cash value when they are purchased, and the value should be shown as if it was a savings account or CD. Only cash assets should be included on the report. There is no place for non-monetary items, and the value of donated stocks, furniture, building, etc. should not be included in Conference annual reports because they are not cash items. If the purchased stocks or the donated items are sold, the cash received becomes a gain or loss and is reported as other income on the report. Please keep in mind that the SVdP annual report is in no way a mirror of IRS filings.

It is not common for Conferences to purchase stocks. Conference funds are meant for assisting neighbors in need in the short term, not for investment purposes. If stocks are gifted, a Conference should plan to spend them in a reasonable time period.

(1/12/2023) Q: We are attempting to re-write our policy and procedures and the topic of store discounts came up. Checking with other SVdP stores and other nonprofit thrift stores, we learned that most give their employees and volunteers (both non-Vincentian and Vincentian) discounts. Should Vincentian discounts be allowed? Can you give us further insight on this?

A: First, it is a local decision regarding when any store discounts are allowed. Granting a discount to employees and volunteers working at a store is an acceptable practice. The percentage of the discount should never be extravagant since that would make us self-serving. Whether the discount should be offered to other Vincentians who do not work at the store is a decision of the Conference or Council that owns the store. Keep in mind that Vincentians do not receive compensation for their Conference work.

(1/12/2023) Q: We take a secret collection at each of our Conference meetings. I was under the impression that we can't use the Conference general fund for anything other than helping our neighbors in need. However, it is my understanding that we could vote on how to use our secret collection funds. We took a vote to help fund a homeless coalition with the rental fees for a storage unit that holds their donated items for the homeless. We agreed to cover the storage rent for the next 6 months with our secret collection funds. Two-part question, did we break the rules? We are obligated to pay for three more months out of the six we voted to pay: Can our Conference still pay the remaining balance?

A: Conference Members may vote to use their secret collection for purposes other than contributing to the Conference. They may choose to collect funds and contribute the secret collection for a particular purpose; however, when contributing the secret collection to another organization, the contribution must not be identified as coming from SVdP. It would be a contribution collected to support a particular effort. A Conference should never agree to support another organization unless it is a Vincentian entity. Before the collection takes place, clarify that the donation would be from individuals, not the Society.

The Rule is not specific about the secret collection. The secret collection goes back to the beginnings of the Society. In the beginning, Conference funding came strictly from 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. Page 87 of the "Apostle in a Top Hat" indicates the first Conference used a top hat for the secret collection. Today, the secret collection is more of a token.

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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 should be decided before the collection is taken. It's a Conference decision and once the decision is made, it must be honored by all members.

(1/19/2023) Q: Our Conference has a few questions. We want to help our school children. The principal has a few suggestions. I want to know if we can do any or all of these.

- 1. What's the best way to give school supplies to the children in need at the school?**
- 2. How can we supply clothing (hoodies) for the children who do not have appropriate clothing, as suggested by the school nurse?**
- 3. The third suggestion to help the family in need is for Conference to contact them directly.**

A: In all three cases you describe, the school should be able to contact the families and ask them to either contact SVdP for assistance or give the school permission to give SVdP contact information about the family in need. Otherwise, by strict interpretation of the Rule, any purchases specifically made to give to the school to give directly to the children in need at the school, is prohibited by the Rule.

(1/26/2023) Q: I have a couple of new members, actually, husbands of active members, that want to help when needed. Are they required to attend Ozanam Orientation within one year of joining?

A: All Active Members must attend an Ozanam Orientation within a year of joining the Conference. Associate members, which would be the membership category of the spouses you are referencing, are not required to attend. 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.

(2/2/2023) Q: How involved can a pastor be with the Society of St. Vincent de Paul? I believe I read somewhere that SVdP is a separate entity from other organizations in the Church, and that the pastor cannot tell us what to do with our donations (monetary). Are they able to tell us, for example, when, or if, we can or cannot collect food for the poor? When, or if, we can or cannot have more than two food drives a year, etc.?

A: You will find in both the [Rule](#) (Part III, Statute 15) and the [Manual](#) (pages 50), that ordained ministers (deacons and priests) normally hold the role of Spiritual Advisor of a Conference or Council. They are asked to give Conference members spiritual guidance related to their own personal growth, as well as their ministry; and they can participate in any Conference discussions. They may also go on Home Visits if they choose. They are not the decision makers of the Conference. Ordained ministers may not vote or hold office or be a signor on Conference accounts.

SVdP is a lay organization in the parish at the invitation of the pastor. We must therefore maintain good relations with him and the parish staff. The pastor can control when and what types of parish collections are to be held, how often parish facilities can be used by outside groups including SVdP, and other decisions involving parish operations and policies. They do not control SVdP finances and are not to be signors on Society bank accounts. Ask your District or Diocesan Council President to meet with your pastor and try to resolve any issues or concerns from Conference.

Common Vincentian Questions and Answers

(2/2/2023) Q: It came up at our last meeting whether or not Conferences can apply for grants? Not sure if that is allowed since all our funds are donations.

A: All Conferences are eligible to apply for grants. However, if a Conference is using a Council's EIN, it must have the permission of the Council to apply for the grant; technically, the owner of the EIN is the responsible party for the grant and must ensure the terms of the grant are honored. The National Council offers grants to Conferences such as the Friends of the Poor® grant.

(2/9/2023) Q: If our mission is to be holy and lead others to Christ-like holiness does it make sense to have a Jewish person as a lead role?

A: An Associate Member is someone who helps us with our works of service. He/she may or may not be Catholic. According to the Rule, they can indeed be members on committees; but cannot vote as stated in the standard bylaws. They can also be the chair/head of committees, but not officers at any level.

(2/9/2023) Q: A Conference in our diocese has been given by the Bishop to the Latin Priests. He does not want a Conference attached to the parish but is okay with a free-standing Conference that serves the poor in his area. Is there anything Conference members need to do to inform National that we are no longer a parish-based Conference?

A: There are no National Council records that have to be changed – only the way the Conference operates and solicits funds and members. The Diocesan Council and District Council must be aware of this arrangement.

(2/16/2023) Q: Does the Conference president have the authority to override a negative vote when there is a request to suspend the normal guidelines for providing assistance to a neighbor in need?

A: All of the guidelines are determined and established by the Conference as a whole. The only party who can go against those guidelines is the Conference as a whole, either changing the guidelines or establishing the case as an exception. The president may contradict a decision of the Conference if that decision violates the Rule of the Society. The treasurer may contradict a decision of the Conference if it calls for spending more money than is available.

(2/16/2023) Q: After reviewing the [bylaws template](#) for District Councils without a board (Document #8), a question arose. As I understand it, the voting members of the Council must also be Conference presidents. Does that also mean that the officers appointed by the District Council president must come from the Conference presidents? If not, what voting rights do these individuals have? Can the District Council Board grant an officer who is not a Conference president?

A: When you have a District Council that is not incorporated (without a Board of Directors), you must follow the standard structure of voting for a District Council. The only voting members are the District president and the Conference presidents. Period. The VP(s), secretary(ies), and treasurer(s) can only vote if they are also Conference presidents. Based on the standard structure of an SVdP District Council, a District Council (not incorporated) cannot appoint additional voting members.

Please keep in mind that incorporated District Councils would use Bylaws Documents #3 or #6, which allow for a Board of Directors and appointment of additional voting members.

Common Vincentian Questions and Answers

(2/23/2023) Q: Our diocese is merging five churches into one parish. Each church has a SVdP Conference and they are merging into one Conference. In accordance with the bylaws, the Conferences that are closing need to turn the funds over to their respective district. Can they transfer the funds to the new Conference or is this against the Rule?

A: The Conferences are merging — not dissolving as the bylaws passage describes. The funds from all the affected Conferences should be merged into one.

(3/2/2023) Q: We decided that messages could not be left on the SVdP phone. We can only be reached on Mondays 9:00 AM - 11:00 AM. Is this practice okay? What, if any, are the ramifications of this practice? What do you think of this practice?

A: The consequence is that our friends in need have nowhere to turn if the Conference can only be reached at the hours indicated. The recommendation is to have a separate phone line where messages can be left and checked more frequently by members in order to serve our friends in need.

(3/9/2023) Q: What is your recommendation on having our current store and new store establishing separate EIN's rather than under the Council umbrella. If it is recommended that they set up their own, would we have one EIN for stores or would we have one for each store?

A: This is a local decision. However, you opt to separately incorporate a store under its own EIN (or a group of stores under a single EIN), care must be given to the formation of the new entity and the bylaws to ensure that ownership and control are still in the hands of the Society entity that created them. The [Special Works Bylaw](#) was created specifically with this in mind. You will also need to establish separate tax-exempt status, and file separate Form 990s annually, for each incorporated entity.

(3/9/2023) Q: Is a Conference permitted to receive a gift of stock or mutual funds from a donor? If so, how so and are they able to draw off dividends?

A: At various times, Conferences and Councils have accepted stock and/or mutual funds as gifts. With the right procedures in place, Councils or Conferences can receive gifts of stock. Receiving such donations requires a brokerage account which is something most Conferences don't have. Conferences need to consult their next highest Council for advice. This is especially necessary if the Conference does not have its own EIN, in which case such funds would be under the Council's control. Typically, stocks are sold, as they are often donated at their highest value. We are servants of the poor, not investors. In the case of very large gifts, we recommend money market accounts to preserve funds for future services. The National Council has a document on the use of funds called [Hoarding – What Does It Mean](#), that provides good insight into the use of large donations.

(3/23/2023) Q: Are all three levels of membership eligible for the Top Hat Award? Is the 'spirit' of the Top Hat Award to nominate someone who is an Active or Associate Member, but not necessarily someone who is a Contributing Member?

A: The Top Hat Award is a local award given by the local SVdP Council, who decides the requirements and eligibility for the award. The National Council has no guidelines for this award and does not determine which membership level is eligible to receive it. This is a decision solely for each local Council. Also, since the Rule was last amended in 2018, it no longer recognizes Contributing Members, but only Active and Associate Members."

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(3/23/2023) Q: Can our Council Thrift Store consider hiring individuals with criminal records? There are some obvious instances like a pedophile, or sexual abuse convictions that we perhaps should prohibit, but how do we give an individual a second chance for less offensive convictions? What is the Society's position on hiring practices for these individuals?

A: Before creating a hiring policy or creating a Safeguarding policy, check with a local employment attorney. There are locations where you are not allowed to discriminate based on criminal record (even pedophiles) unless it is a job-related offense. There have been cases of high damages won in some cases when there was never a chance of the employees having contact with children. Having a written policy could actually be used as evidence of intent to discriminate. These are decisions made by local SVdP Councils and Conferences under our principle of subsidiarity. Many of our Councils offer services for returning citizens, including employment training and placement services, so we should consider our own hiring practices as a matter of example. The Safeguarding Task Force has produced a Policy Assistance paper to help Councils (and as needed, Conferences) develop their own Safeguarding policy, a recognized priority of the National Council. Click here: <https://members.ssvpusa.org/news/national-safeguarding-policy-help/>.

(3/30/2023) Q: We are currently working on guidelines for our Conference Home Visit teams. Is it a St. Vincent de Paul Society policy to get a driver's license number or other government issued identification from everyone we visit?

A: You will find that it is necessary to confirm the identification of the people you are helping, especially when bills are being paid. It is not necessary to record the identification provided unless you require it to pay a bill on their behalf. Such records should then be destroyed. The Society has no need or requirement to maintain personal information.

(3/30/2023) Q: Our Conference is having a discussion about our area of coverage. Is it acceptable to help those in need who work in our parish boundaries or only those who live within? We'd like to expand our help but haven't found anything definitive about this. Not all the parishes in our area even have a SVdP Conference.

A: There are no rules associated with this. Actually, in most places, Conferences don't have specified boundaries because most Councils do not have Conferences to cover all parishes. This is generally something decided on by the Council. Conferences may help anyone, but if they help someone from within another Conference's boundaries, they should work with that Conference to determine the help to be given and protect against duplication of services.

If there are parishes where no Conference exist, this is a great opportunity to invite the pastor to establish a Conference. If the pastor of a neighboring parish does not want to start a Conference, it is indeed okay to ask the pastor for financial support for his community being served.

(4/6/2023) Q: What is the difference between Society twinning and co-pays?

A: Part III of the Rule, Statute 26 (Use of Funds) states: The funds of the Society shall be used for the works of the Society, including Vincentian twinning and collaboration in payments for people we serve. When funds are given from a Conference or Council to another Conference or Council to be used as the receiver finds appropriate, this is called twinning. The distribution should be recorded as twinning. When funds are sent to another Conference as collaboration in payments for people we serve, then this is called a co-pay. When the intention for the negotiated distribution was to help a specific person or family, the co-pay should be recorded as aid to people we serve, and a case record should be established for this transaction.

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(4/6/2023) Q: May we pay medical co-payments for our neighbors in need?

A: Yes, one-time medical co-pays are allowed. However, for ongoing medical co-pay requests there all Conference members should be in agreement to avoid long-term commitments.

(4/13/2023) Q: How long can a person hold the office of Interim President? I have searched the Rule and cannot find this topic mentioned.

A: When a President resigns or is no longer able to fulfill his/her role, the vice president assumes the role as "Interim President" until an election is held. For Conferences the bylaws say the elections should occur within three months. [Council bylaws](#) article 12 say that the elections should wait three months so Conferences can be consulted. This is prescribed in the bylaws under Extraordinary Circumstances as follows:

Extraordinary Circumstances

Should the President resign, become permanently incapacitated, be removed from office, or die during the term of office, then the First Vice President of the Corporation Board shall serve as President until the election of a new President.

Upon the vacancy of the office of President prior to the completion of a three-year term, the First Vice President shall, within 10 days from receipt of the notice of the vacancy of the office of President, convene a Nominating Committee whose duty it will be to initiate the election process. A slate of candidates shall be prepared and presented to the Corporation Board. A period of three months should be allowed for Corporation Board members to consult with Conferences within their own District Council.

(4/13/2023) Q: What is the term of service for Presidents at each level? What is the Rule / Statute for this?

A: The term of office for a President in the Society can be found in each set of bylaws under the header Term of Office and Term Limits for Officers. [Click here](#) to view all nationally approved bylaws.

This information is also found in the [Rule](#), Part III Statute 12 for all levels of the Society in the U.S. The term of office of the President for Conferences, District and Diocesan Councils is three years (ending on September 30 of the third year). Once a President has served for two consecutive terms, that person will not be eligible for re-election as President until a three-year term has elapsed under a different President. The term of office of the National Council President is six years. It begins on October 1 and ends on September 30. It is not renewable.

The Rule Part II Statute 3.4 states that the International President General term has changed to only one six-year term (not renewable). This was by resolution, and we have not changed Part II in our printed Rule.

A vote must be held for the elected office of presidency at all levels of the Society, regardless of the first term incumbent's desire to run a second term. Consideration of other candidates for election must be allowed. An election must be held whether there are several candidates or just one.

(4/20/2023) Q: Can a Council or Conference twin with their associated or other SVdP-run Thrift Stores?

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A: If a Conference or a Council owns a thrift store, they can transfer funds to that store's operations at any time. This is an internal transfer of funds. For SVdP reporting, it has no income value to the store or expense value to the Conference or Council since the funds are already owned by the Conference or Council. Check with your CPA to affirm this.

However, if a Conference wants to send money to its own separately incorporated store or one owned by any other Conference or Council, this is considered twinning.

(4/20/2023) Q: We have two friends who recently lost a spouse. Are we allowed to help them with the cost of the funeral?

A: This is a service provided by many Conferences. The extent of help is up to the Conference. Assistance should follow the same protocols and limitations as would assistance for someone unknown to the members.

(4/27/2023) Q: Our new president was told by our parish priest that he had the authority to shut us down if there were problems within our Conference. Can you give us some insight into this, as I was of the assumption that only our District Council has that authority?

A: The parish pastor does indeed have the authority at any point in time to tell the Conference to go away and not operate in his parish. We are present in parishes at the invitation of the pastor. However, priests do not have authority over Conference operations. According to our Rule, the pastor and bishop are the Society's authority only on matters of faith and morals.

(4/27/2023) Q: We have a Conference celebrating 80 years. Is there a certificate or some other form of acknowledgement available from National? The plan is to celebrate the Conference milestone at a district meeting.

A: A Certificate of Appreciation from the National Council is available in five-year increments for Conferences aggregated, Councils instituted, and for Special Works. For more information, contact Pam Hudson Johnson, phudson@svdpusa.org. You could also request a letter of congratulations from the National Council President.

(5/4/2023) Q: During our bylaws review, our district officers brought up a question about VOP and 501(c)3 compliance regarding advocacy. How can VOP do advocacy without jeopardizing the Society's 501(c)3 status?

A: IRS Publication 1828 states that churches and religious organizations are allowed to lobby unless it constitutes "a substantial part of its overall activities." Given the amount of time our volunteers spend on service to neighbors in need, we don't have a danger of meeting that test.

Keep in mind that members of the Society can never endorse a candidate for office. That is clearly prohibited by IRS regulation. Members are encouraged to fully participate in elections and support candidates of their choice. They must do so as citizens, rather than use the name of the Society.

(5/4/2023) Q: When a neighbor in need has been interviewed and a recommendation has been made by the two people who visited, what is the rule on voting to honor that recommendation?

A: First, if a related policy has been made by the Conference, all members must honor it. The Home Visit team assesses the neighbor's situation and presents their recommendation(s) to the

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membership body. A decision can then be made properly by the Conference in Vincentian fellowship from the recommendations.

(5/11/2023) Q: Can a former president of a parish Conference that closed become president of an active Conference whose president's second 3-year term has ended?

A: A former president of a closed Conference can become president of an active Conference whose president's term has ended as long as the members of that Conference accept him/her as a member. She/He has to be an active member, which means being Catholic, attending meetings, and performing Conference works.

(5/11/2023) Q: Where can you find information on the installation of Conference officers?

A: The procedures/prayers for the installation of Conference officers can be found beginning on page 58 of [Vincentian Celebrations - Rituals and Ceremonies](#).

(5/18/2023) Q: Can the "advisors" on a Council advisory committee vote on advisory committee issues?

A: Yes, the committee members can vote on matters concerning the committee. Committees are advisory. Any matters/recommendations presented to the Board of Directors must be approved by the voting-eligible Board members before the recommendation becomes policy and can be passed on to the Vincentians in the Council at large.

(5/18/2023) Q: Are Conferences allowed to pay a stipend (say of \$100) to a volunteer (who is not a Vincentian) who does a lot of volunteer work in their food pantry?

A: We are required by law to pay at least a minimum wage to people who work for us. If this is done often or on a regular basis, then that person needs to be an employee or under contract. If under contract, we need to issue a IRS Form 1099 if the total exceeds \$600 in a calendar year. Stipends are usually only paid for a temporary, short-term job.

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(5/26/2023) Q: A police officer with young children died from an illness, and his funeral was held at our parish. His obituary read "Due to the family's unexpected loss, the family requests assistance in covering funeral costs and the education and future for their children."

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Donations may be made directly to the family,” at a website provided. Can our Conference provide the assistance requested in the obituary?

A: A Conference is not permitted to simply respond to an advertised request for help. If the family comes to the Conference requesting help, we can respond.

(6/1/2023) Q: Why is the maximum term for Council/Conference Presidents two three-year terms or six consecutive years total? How and who decided on that number of years? If, for example, a Conference President is doing a good job and wants to have the position for another term beyond the two served, especially if all members agree and no one wants the position, why is that currently not an option?

A: It's very simple, it is in the Rule of the Society. At the end of six years, that Vincentian must step down and the Conference must elect another Vincentian as President. The current President must be out of office for at least three years before he/she may be elected again. This requirement helps us assure continued servant leadership through sharing of responsibilities over time.

(6/1/2023) Q: When our Conference Home Visitors come across a neighbor in need that has put the utility bill in one of their children's names, should we pay it? Putting the account in a child's name is basically fraud, but for some families this may be the only way to have electric and gas service. Do we ignore this “crime” and keep the lights and heat on?

A: This is a local decision, but if the request to pay is made by the parent, and both the parents and the child live there, why not pay it? Don't do billing work for the utility company.

(6/8/2023) Q: One of our Vincentians has asked if our Conference can spend funds to improve the poor boxes in our parish church. We receive the contents of the boxes each week. They've gotten a little shabby, and our pastor has been working on improving the church's environment with new pews, new stations, etc.

A: Since the funds from the poor box are given to SVdP, the Conference may purchase replacements for the poor boxes and treat it as operating expenses. However, the Conference may not contribute funds directly to the parish to purchase the replacement poor box as this is against the Rule.

(6/8/2023) Q: Is it permissible to handle requests for assistance from repeat callers via a telephone call? Our Vincentians will typically make Home Visits to a neighbor in need. Sometimes a follow-up telephone call is made to the neighbor in respect to their assistance request for which the Home Visit was made. Sometimes weeks or months after this request is resolved, the neighbor in need may call back and make another request for assistance. May our Vincentians handle these calls via a telephone call instead of another Home Visit?

A: Most of the calls received should be handled through a Home Visit, but a determination can be made individually, case by case. If several months have passed since the last Home Visit, Vincentians should reacquaint themselves with the neighbor's situation and not assume it to be the same. Therefore, it may be necessary to reevaluate their circumstances. The telephone call may be appropriate for follow-up on an existing request, but not for new requests.

(6/15/2023) Q: How important is it to get a receipt? We always have an electronic copy of the check from our bank, but is that enough? Prior to COVID we would drop off checks to management companies or landlords in person and receive a receipt immediately. During COVID we generally would mail a check along with a letter with information about the help we

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were providing, requesting that they either email or send us a receipt in the mail. Most send receipts, but some do not.

A: Every effort should be made to get a receipt. If it is not possible, then a note from the Vincentians involved with the transaction saying that the receipt was not given should be used in place of the receipt. This should also be recorded in the case record.

(6/15/2023) Q: The Rule and Manual talk about a festival meeting, and that you can receive a plenary indulgence for it. How do you define a festival meeting, and could a Morning of Reflection be considered as such?

A: The Rule is explicit about what are considered festival meetings. According to the Rule, Part III, Statute 9, Vincentians celebrate "Festival Meetings," by attending Mass together. Members meet on one or more of the following: Ozanam Sunday (the last Sunday of April, in honor of the April 23 birthday of Frederic Ozanam), the Feast of Blessed Frederic Ozanam (September 9), the Feast of St. Vincent de Paul (Sept. 27), the Feast of the Immaculate Conception (Dec. 8), a Conference Mass celebrated once a year, and another feast day of local custom. A Conference Day of Recollection by itself cannot be considered a Festival Meeting unless it is held in conjunction with a Mass that all members attend on one of the above days.

(6/22/2023) Q: Our parish Social Outreach Director received a \$3,000 anonymous donation. The donor stipulated that it be used by the SVdP Conference to help the needy. The Outreach Director wants our Conference members to contact him individually for the amount of money needed after visiting a neighbor in need. Is this the proper way to handle a donation given to our Conference?

A: The money received should be given to the Conference treasurer to be deposited in the Conference bank account, and individual checks then be written for each purpose. The Outreach Director should not try to micro-manage the use of the funds.

(6/22/2023) Q: In the Rule, is there an age limit on nominees for local Council or Conference President?

A: The age limit was removed in the 1980s, when it was determined to be age discrimination. The new Rule, adopted in 2003, has no age limit for local Council and Conference Presidents.

(6/29/23) Q: Are there any general guidelines on interviewing our friends in need? Is there a guide for interviewers on Do's or questions not to ask?

A: Guidance for Home Visits and interviews can be found in two new books on the [national website](#): [Vincentian Life: Conference](#) and [Vincentian Life: Member](#). These files may be found on the website Extension Portal under the category of Training. Serving in Hope, Module VII, is also devoted to Home Visitation.

(6/29/23) Q: Should we continue to support the neighbor who refuses to even look for employment outside his/her chosen profession?

A: The Conference makes the decision whether to help or not, including to help only once or on a continuing basis based on the perceived ability of the neighbor to help oneself. The Conference decides if the need is real and if they have the resources to help. Listening and counseling, including employment options, can also be part of our Vincentian service.

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(7/7/2023) Q: As far as I know, we have Active and Associate Members as the only two types. But on the National Members Database, the choices are Active, Associate, Contributing, and Volunteer. Are there really four categories of members?

A: Active and Associate Members are clearly defined and are included in Annual Report statistics. Contributing Members do exist and should be recognized in the database if they are significant donors. They are no longer listed in the Annual Report because many Conferences decided to include all parishioners in the count, which overinflated the numbers. Volunteers are not regularly associated with the Conference and help only on occasion. This category works well for Conferences that operate special works or stores where you may have people helping out with community service hours.

(7/13/2023) Q: I have a question about volunteer of the year awards. Our rules talk about members living with simplicity and not looking for personal accolades or glory. How would volunteer of the year fit into that?

A: The Conference has to decide that an award would be appropriate. If deemed appropriate to do so, Conference members have to contribute or donate to purchase the award. It is still a Conference expense, however funds given to help the poor may not be used for this expense. In addition, not all awards and recognitions need to be purchased.

A traditional award given by Conferences and Councils is the “Top Hat Award.” Criteria for this award are determined by the local Council (or Conference), and the award itself may be as simple as designing and printing your own certificates.

(7/13/2023) Q: One of our members has suggested that for Home Visits we partner with graduate students in social work from a nearby university. So many of the neighbors we meet need multiple layers of assistance from different agencies. Is this allowed? The students would gain experience but would not be paid, and they would not be Vincentians. This seems out of keeping with our Vincentian spirit and with rules of confidentiality.

A: Social workers are governed by a whole set of rules that (may not apply equally) for Vincentians. Therefore, in good SVdP governance guidance, this would not be a good partnership for Home Visits. It might be good to seeking advice as to resources available to help those who come to us.

(7/20/2023) Q: Do we need to put the Non-discrimination Policy in the Bylaws or keep it with other policies such as the Conflict-of-Interest Policy?

A: Conferences need to define the non-discrimination policy and include it in their bylaws. [The general Non-Discrimination Policy is found on the national website.](#) We strongly advise checking with local attorneys to be sure it is valid for your state and local government requirements.

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(7/27/2023) Q: I have always been told that \$.30/mile was acceptable. Has the Society increased the reimbursement for mileage due to the fuel price increases? This is not for Home Visits or serving the poor, it is for travel expenses in growing new Conferences or traveling to national meetings.

A: The rates are determined by the IRS, not the Society. The IRS has determined that \$0.14 per mile driven as a volunteer is an appropriate rate for reimbursement. This rate for charity has remained the same since 1998.

The 2023 business mileage reimbursement rate is 65.5 cents per mile, which applies only to employees of the nonprofit.

(8/3/2023) Q: In the interest of having more of our members assume an officer position, our Conference would like to change the term of office to be one year, with re-election possible for more than one year, but not more than six. I cannot find any provision in The Rule for changing the term of Conference office. Can we do this with a simple vote to change the term of office?

A: The answer is No; the president is only elected for a three-year term. It is in the international Rule of the Society and cannot be changed. All other officers are appointed by and serve at the elected president's pleasure. See the Rule Part III, Statute 12: Servant Leadership Positions.

(8/3/2023) Q: Our Archdiocesan Council has its own EIN that includes nearly all the Conferences, but my Conference has a separate EIN, and we are a separate 501 (c)(3). We received notice to provide the ADCC with an audit, but I don't believe that we would be a part of their audit. We are definitely part of the Archdiocesan Council, but are we part of their audit?

A: The audit typically includes all entities using the Council's EIN. If your Conference has its own EIN, then your Conference should conduct a separate audit at the Archdiocesan Council's request. Part III of The Rule, Statute 27 states: 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. In addition, Conferences are required to perform an audit every year. A copy of this audit should be passed on to the upper Council.

(8/10/2023) Q: Are Conferences permitted to own land and buildings separate from their Council?

A: If a Conference is separately incorporated and has its own tax-exemption, it may own property. If the Conference is using the EIN and tax-exemption of a District or Diocesan Council, it is part of that legal entity, and ownership of property is defined by the owner of the EIN.

(8/10/2023) Q: Members delivering furniture to a neighbor in need using their personal vehicle accidentally backed into a mailbox — damaging the mailbox and the vehicle. Should the Conference pay for the mailbox and the vehicle repairs?

A: Please consult your Council/Conference insurance policy for coverage. It may require that when a Vincentian has an accident with their own vehicle, it is the Vincentian's auto insurance that comes into play first. The Council or Conference may then have liability insurance to cover this case. The Conference can separately make a decision to pay or not pay for related damages for either party outside of its insurance coverage. If our work damages the property of a neighbor in need, there is a moral obligation, regardless of coverage, to make it right.

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(8/17/2023) Q: What can we include in our volunteer hours? Is working at a funeral, serving food, choir, sacristan, driving an elderly neighbor to an appointment, or babysitting for a family in need or the members' grandchildren also allowed to be included in volunteer hours?

A: Any member activities that are directly associated with SVdP Conference life can be considered volunteer hours. If individuals volunteer outside of their Conference duties, it should not be counted in the annual report data. If working at a funeral, serving food, choir, sacristan, etc., are activities of the Conference life then they can be counted. If these are individual choices in support of the parish but not Conference works, these volunteer hours cannot be counted.

(8/17/2023) Q: Is there a national policy about sharing documents in a criminal case with a pastor? We have shared the information with him, but he now wants copies of the documents, which we have given to the local law enforcement authorities. The parish itself is not involved in the case.

A: This issue should be discussed with an attorney. A lot depends on the nature of the case. Depending on the nature of the information, it may impact an investigation. Both the pastor and the attorney should know and understand that confidentiality is highly emphasized within the Society. The Society operates at the pastor's permission and relies on him for matters of faith and morals. If the case involves these issues or parish property/resources, the pastor has a right to be informed.

(8/24/2023) Q: Does the IRS care if a Conference violates the SVdP Rule and gives to another non-SVdP charity that agrees to spend the money wisely?

A: The IRS indeed cares if a nonprofit violates its own mission, organizational documents, and rules. The Society cares if an SVdP entity violates its Rule. The IRS is not aware of all of SVdP's prohibitions, but you are. As a holder of an IRS tax-exemption and a member of the Society of St. Vincent de Paul, you must honor both. We have tax-exempt status to use funds to fulfill our mission which is stated in our letter of exemption. We are not a pass-through organization. If our donors want to support another organization, they would give the funds to that organization.

(8/24/2023) Q: Should the minutes of a Conference meeting include specific details of a Home Visit, or is it enough to note what action was decided upon to help a person/family?

A: Conference minutes are the written record of decisions made by the Conference. The details of the Home Visit are not necessary in the minutes; they may be in a separate case record. However, if there is something about the visit that results in a Conference decision, some details might be noted in the minutes.

(8/31/2023) Q: Why does SVdP require meeting twice in a month?

A: The Society wants Conferences to meet weekly (52 meetings per year); however, the international Rule allows for every other week (26 meetings per year). In the United States, we allow for twice each month (24 meetings per year) while still promoting that weekly meetings are the ideal. It's important to meet frequently because:

1. This provides for shorter meetings. The farther apart the meetings, the more you have to cover. In Part III of the Rule, Statute 7, there is a lot that needs to be discussed during a meeting.
2. All decisions must be made by the Conference as a whole. You should not let decisions be made by a few people, which is what happens when there is a long time

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between meetings. The Society does not support decisions being made only by the President or his/her slate of officers.

3. Our primary goal is the spiritual growth of members. At meetings, we learn about our faith as it applies to our ministry.
4. The meeting is also about fellowship and friendship between the members. If Conference only meets monthly and members each miss one or two meetings due to vacation, conflict in schedule, or illness, the possibilities for growing in friendship with your fellow Vincentians is reduced significantly.
5. From a services standpoint, sometimes the whole Conference needs to discuss a request for help and make a decision. If the next meeting is a month away, then the decision to help or not help is unduly delayed or left up to a few. See 2 above.

(8/31/2023) Q: Many Conferences in our Council now use ServWare for case management. If all case records are stored in ServWare and the recommendation is to destroy case history after three years, are we required to do that?

A: Yes, record retention is defined not only to save storage space but to eliminate data that no longer has relevance.

(9/14/2023) Q: A Conference received a request from a shelter for winter coats and gear. They ran a collection drive, met with the shelter, and made a donation to the shelter. The Conference VP was told that they should have conducted a Home Visit with the families in the shelter and then donated the clothing. I understand the importance of Home Visits, but I don't think they would be required in this situation.

A: We are prohibited by our Rule from making donations specifically for our use (like food for our pantry or clothing for our direct distribution) and those materials are of money or materials to an outside organization. This includes raising money or materials for that organization. The money and materials we are given are for the use of the Society members in serving those in need directly — not through another organization. If we raise materials more than we can use before they expire, then we can give our excess to another organization, after contacting and offering the goods or resources to other SVdP entities first.

(9/21/2023) Q: What process does the Society take to endorse any legislative efforts?

A: The National [Voice of the Poor Committee](#) identifies legislation that affects the people we serve and involves the National President in the process. Only the president speaks for the Society. The Society may not participate in any campaign activity for or against political candidates. We may advocate for or against legislation, but not candidates. For local issues, the Council President must approve and may represent or delegate to the Council's local VOP group.

(9/21/2023) Q: Can a parish employee be an officer of a Conference/Council? Are there any roles they cannot hold?

A: There is no prohibition of parish employees becoming Active Conference Members and then Officers. However, conflict of interest is a strong consideration. If they place their loyalty to the Pastor and allow that loyalty to give the Pastor control over the functioning of the Conference or its funds, then they should withdraw from the Officer role and/or the Conference.

(9/28/2023) Q: Can we vote to use our secret collection funds to buy gift cards for the children of our needy neighbors who called in asking to be put on our parish giving tree?

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A: Conference Members may vote to use their secret collection for purposes other than contributing to the Conference funds. When contributing to another organization, including the local Parish, the contribution must not be identified as coming from SVdP, since they are not giving to the families or children directly through an in-person or Home Visit.

(9/28/2023) Q: Concerning the Commissioning ceremony, is there a certificate or some form of formal recognition that is part of this ceremony?

A: Many Conferences present pins to Presidents and past Presidents as part of the Commissioning Ceremony. There are also [pins for Members](#). There are no certificates available; however, you may create your own.

(10/5/2023) Q: Where is the official ruling that discourages our neighbors in need from seeking help from more than one Conference? As I understand it, we help neighbors who are located within our Conference boundaries. However, I hear that neighbors go to a Conference for help and other Conferences claim they have also helped that person. I was always under the impression that this activity was highly discouraged. Can you clarify the ruling on this?

A: The Society has no nationally established guidelines discouraging our neighbors in need from seeking help from more than one Conference. 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. Also, not all Conferences offer the same services. Any rules associated with staying in the parish boundaries are normally established within a District or Diocesan Council.

(10/12/2023) Q: We have a Conference reporting more than \$100,000 in the annual report. The balance includes a checking account and investment account. They are reporting the investment gain or loss on line 5E Other Misc. Receipts. Since we report on a cash basis, how should the accounting of gain or loss be reported in the annual report? Should it be considered an adjustment to the beginning balance?

A: The annual report is a cash report. Any interest you gain from the checking account is real cash and should be reported under 5E. Only the change in cash should be reported on the annual report. If the investment account includes stocks and bonds, they have the original cash value. If cash dividends are received, they are reported under 5E also. A value increase or decrease is not reported until cashed in.

(10/12/2023) Q: Our Conference received some McDonald's stock a few years ago, and we would now like to convert this stock to cash. How do we do this?

A: Stock received by a Conference can be converted to cash; however, members should obtain financial advice related to how to handle this process. Please email [Nancy Pino](mailto:npino@svdpusa.org) (npino@svdpusa.org), National Council CFO, for initial assistance.

(10/19/2023) Q: Can a person join more than one Conference?

A: A Vincentian can hold membership at two Conferences. The member should disclose dual membership status information to both Conferences. Active Membership is defined by the Rule. Although allowed, it's not often that one person is a member of more than one Conference, so duplication of numbers reporting is not significant.

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(10/26/2023) Q: At a recent multi-Conference gathering, someone suggested that if a neighbor requests assistance more than once, the neighbor will be asked to perform "community service" in order to be served beyond the initial time. Is this in keeping with either the spirit or the letter of the Vincentian Rule?

A: The works of the Society have always been in imitation of Jesus. The assistance provided by Jesus was unconditional. He did not require those He helped to do anything in order to receive His assistance.

Once you require someone to do work in order to receive something in return (food, clothing, furniture, rent payment, utility bill payment, etc.), it falls into the realm of an employer-employee relationship with laws that have to be followed in that respect. What you are describing is not something the Society endorses.