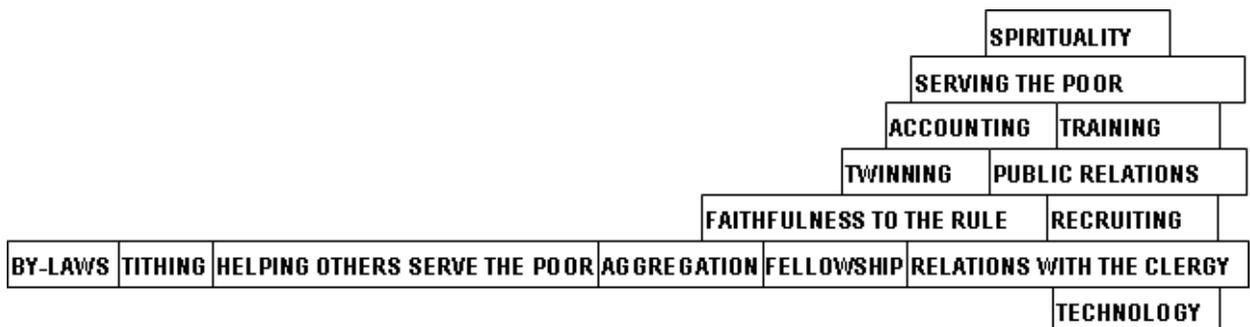


BRICKS to build the foundation

A REFERENCE BOOK FOR CONFERENCES



Produced by the
Conference Resources and Concerns
Sub-Committee
May , 2016



BRICKS to build the foundation

May, 2016

Introduction

So, what is a Brick? In 1996, the Conference Resources and Concerns Committee developed the concept of the BRICK as a means of communicating, informing and training Vincentians. A Brick is a foundational building block - one of many available to us to help them strengthen their Conferences. Although the Council published a regular *Newsletter* and "*Up-to-Dates*," something was still missing. Some vehicle was needed that would allow the Council to take an idea and develop it with all of the detail that was necessary to complete a special project, to promote a basic concept of the Society or to celebrate a special feast day. What was needed was some way to promote an idea with the Conferences, but for that idea not to be lost when the officers changed. What the Committee came up with was the BRICK.

Throughout this reference book you will find the basic building blocks located at the bottom of the page. The blocks form the foundation for our Conferences. The Committee believes that we can take an idea (and there are many), develop it, publish it, ask the Conferences to try it on for size and work with it, and then save it for use in the future. The BRICKS are not published on a fixed schedule, just when the Committee believes there is a topic worth pursuing. After being published, BRICKS will be periodically reviewed by the Committee to keep them current with changes in circumstances and conditions and with National and Phoenix Council policy and procedure changes.

Late 2014, the Conference and Concerns Committee determined that it was time to take a long look at the BRICKS to see if alterations were needed to encourage Vincentians to use the BRICKS for answers to their inquiries. A task force was commissioned to review the BRICKS and make recommendations to the Committee. The following changes were recommended:

- Group the BRICKS by subject rather than by BRICK volume and number. This would assist the search for information by focusing the researcher on only the BRICKS that pertain to their search topic.
- Establish a Table of Contents for each subject group, again, to help the researcher to hone in on their topic of interest.
- Set up a true Index at the end of the BRICKS. The index would narrow the focus of the

researcher specifically to a given topic. Therefore, someone wishing to know more about festivals and celebrations pertaining to St. Vincent could look up either St. Vincent or Festivals and find the pages where that information is located.

- Reaffirm accuracy of all references to the Rule, Manual, Bylaws, etc., to help the researcher wishing to probe deeper into a topic
- Establish a review date for each BRICK that tells the Committee when they must review and update existing BRICKS to assure their validity. This will keep the BRICKS as a reliable and current resource.
- The BRICKS Book is a working document that can be referenced in conference meetings. Someone other than an officer should be given the task of reading and guide a discussion at conference meetings.

In order to make BRICKS readily available to all Conferences, a complete manual copy of all BRICKS produced to that date is given to all Conference Presidents. It is also the intent of the Committee to make the BRICKS available online for reference by all Vincentians.

Committee Members were: Jim Prendergast, Allen Vaughn, Marie Larkin, Guadalupe Valencia, Mary Ann Mueller, Jim Van Winkle, Marc Anderson, and Sandy Edwards.

As one Conference President leaves office and another comes in, the *BRICK Book* should be passed on for continued use. However, should that not happen, the new President will soon be able to find the BRICKS on the SVdP website.

NEW BRICKS: If you wish to write a brick, this is the process. First, present your idea to the Conference Resources and Concerns Committee and obtain approval. Second, you must submit a sample brick that is not longer than one-page and is written in outline form, not novel or narrative form. Third, the Committee will review the sample brick written and then advise you of the status of your request.

Bricks are but one source of information for Conferences. In addition to the Bricks, Vincentian leadership should also be familiar with the Rule, Manual, Bylaws of the Council, districts and conferences, the booklets, "*How to Run a Conference*," and "*Governance: Council and Board*." Together, these provide a bookshelf of reference materials for operations and leadership.

BRICKS to build the foundation

May, 2016

PERIODIC REVIEW OF BRICKS

Bricks are like roadmaps. To be of value, they must be current.

It is for this reason that the Conference Resources and Concerns Committee has implemented a program of scheduled recurring review of all Bricks to assure their accuracy and compliance with changes in laws, regulations, Bylaws, resolutions, motions, policies and procedures. Each page of each Brick now displays a Review Date in the upper right hand corner. The Review Date will tell you that if the Brick you are using has been reviewed and, if necessary, updated to reflect the most current information. These review dates are scheduled depending on the category of the Brick.

Bricks also will be updated whenever it is known that a material change in law, the Rule and Manual or Bylaws makes a Brick significantly incorrect and the change should not wait until the next scheduled review date.

The Committee will review the Bricks according to the following schedule:

CATEGORY	REVIEW PERIOD
Administration	Annually
Food and Pantry	Annually
Financial	Annually
General Information	Annually
Home Visits	Annually
Spirituality	Annually
Technology	Annually

To begin the process, all existing Bricks will be reviewed and updated, and a new Review Date will be given to each one. Thereafter, all newly published Bricks will be assigned a Review Date.

BRICKS to build the foundation

OPERATING INSTRUCTIONS

The software is linked to allow you to have the capability to find a specific section of the document. Use the mouse and hold down the Ctrl key to click on a page number in the Table of Contents to jump from one location to another.

Example: Go to the Table of Contents and then click on “Bundle Sundays” page 7. Press CTRL-Click on the page number and the document will jump to the page number.

To return to the Table of Contents and hold down the Ctrl key and click on the Yellow star. 🌟 You will find the star in the beginning and the end of each document.

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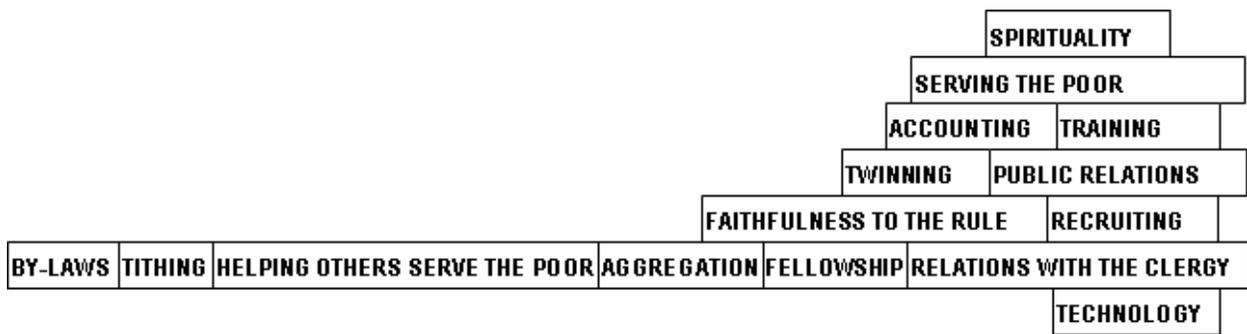
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Revised April, 2014

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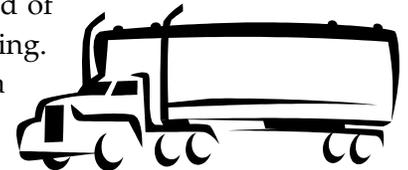
TOPIC: Bundle Sundays

DATE: April 1997

CATEGORY: General Information ☀️

Re-Formatted May, 2014

Our Thrift Stores need your help. Their inventories are in constant need of replenishment. Items always needed are furniture, appliances and clothing. Your Conference can help by organizing a *Bundle Sunday*. Briefly, a *Bundle Sunday* is a weekend during which you have one of our trucks parked in your parish parking lot for your Conference members to load with merchandise donated by your parishioners.



First order of business, after your Conference is in agreement to do this, is to discuss your plans with your pastor for permission and support.

Second, identify someone in the Conference who will be the **responsible person** for the truck and for organizing the *Bundle Sunday* workers. A chart should be made of each member and what/when their duties are scheduled.

Call the normal SVdP pickup number (602-254-3338) to schedule a truck to be at your parish on the weekend you have selected. Our warehouse manager has submitted the following outline of what is expected from the sponsoring Conference.

1. Give as much notice as possible, with a minimum of two weeks prior to the date, to allow us to schedule the truck and pick-up efficiently.
2. The Conference is responsible for publicity. Notices in the bulletins and neighborhood publications are generally prepared. There is a sample of some information that could be

used either in a flyer or a bulletin announcement on the back of this page. Communication is the key to success.

3. Know in advance where the truck is to be parked for the weekend. The truck will not be moved. We do not leave truck ignition keys, only back door keys. A secure parking space is required. We have experienced damage and theft to trucks parked for *Bundle Sundays* and this has an impact on our service to our donors.
4. Small items should be boxed or bagged. Loose items in the truck are a hazard.
5. The **responsible person** will hold the truck back door key and should be sure to lock the truck when the truck is unattended. The driver will give instructions to the responsible person to leave the key in a designated spot under the tailgate of the truck.

For information on Bulletin Announcements, please contact Vincentian Support Services.



Be Alert
Unattended items will be taken – opened – scattered.
Be in Control!



BRICKS to build the foundation

TOPIC: Reporting to Your Parish

DATE: April 1998

CATEGORY: General Information 

Re-Formatted May, 2014

Many times you have heard the expression *being a good steward*. It is used a lot when people discuss the various ministries in which we are involved. *Being a good steward* is more than accepting the responsibility for the resources we are given to use; it also entails being accountable to those who provided the resources. *Being a good steward* is part of the reason that the Conferences are expected to provide quarterly and annual reports to the District and Diocesan Councils. And *being a good steward* is the reason behind asking each Conference to make formal reports to their fellow parishioners on a regular basis – either quarterly or annually.

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

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

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



BRICKS to build the foundation

TOPIC: CDs & Savings Accounts

DATE: November 2001

CATEGORY: General Information 

Re-Formatted, May 2014

Does that sound unusual? Does it sound non-businesslike? It should. St. Vincent de Paul Conferences are not businesses and should not be run as such. Budgeting is as foreign to Conference work as reserve accounts. **There is nothing in the Rule or our manuals to support reserve accounts in Conference work. IF** the Conference acquires a large amount of funding, it should cease any other fund raising activities or collections until those funds are used.

A Conference should not maintain a balance in its treasury journal/ledger greater than the amount it spends on client assistance in two months. Excess funds may be used to support the work of other Conferences (local, domestic, international). This is called “**twinning**.” Excess funds may also be used to help cover the costs of Council special works and programs.

If, in the interview, you determine that the need is real and you have the money, spend it. When someone needs \$300 for rent or utilities and you have the funds to cover it, it is unchristian to say you can only give them \$50. You are being asked to help someone who is in need to the best of your ability. **Judge each case on its own merit.**

The one exception to the concept of reserves is in the case where the Conference itself is operating a special work, such as a thrift store or a dining room. A small portion of the funds may be placed in a reserve to pay anticipated expenses (such as rent, utilities, etc.) for a short period of time (up to six months is recommended).

Remember, we should always operate based on dependence upon Divine Providence. 

BRICKS to build the foundation

TOPIC: What Counts as a Conference Meeting?

DATE: May 2007

CATEGORY: General Information 

Revised April 2014



There has been some question since the passing of the new RULE as to what counts as a Conference meeting. The new RULE is explicit in saying every Conference must meet at least twice monthly. But, does it count if only a couple of members get together? Can it be simply a spiritual gathering? What has to take place for it to constitute a real meeting?

There are two statutes in Part III of the RULE which define this very carefully. **Statute 5** states:

Members of the Society, traditionally gather in communities called "Conferences," which meet weekly, or at least twice a month. This is to affirm the importance of the spiritual and social dimensions of Vincentians coming together as a community of faith and love, prayer and action. Conference members consistently strive to develop a three-fold relationship with God, the poor, and one another – mutual support and friendship.

Statute 7 then states: A Conference meeting includes the following components. This first group is considered absolutely essential for a conference meeting.

- *Punctual call to order; roll call*
- *Opening prayer; Spiritual reading (or meditation)*
- *Approval of minutes of previous meeting;*
- *Home visitation reports*
- *President's report*
- *Secretary's report (including correspondence received, information about the Society or training points)*
- *Treasurer's report and secret collection*

Both of those statutes are very clear. However, we have to be very realistic. Not every meeting is going to include everything listed above as part of the agenda. So, to narrow down to what

might be absolute essentials, we highlighted the key agenda items. If those items are included as part of the agenda of the meeting, then that would constitute an official Conference meeting with the reminder that there must be two of these every month.

In addition, and this is implied rather than explicit, the meetings must be scheduled so that all full members are aware of when they take place and have a reasonable expectation of attendance. After all, you cannot be a full member unless you regularly attend the meetings of the Conference. For those of you who are into “legalities,” we will not say how many you absolutely have to attend as a minimum. In addressing this issue, SVdP leadership has commented that, if you really want to be a Vincentian, then you want to attend the meetings and be with your fellow Vincentians. In most minds, this implies more than a simple majority of meetings. In other words, a full member would only miss an occasional meeting.

Our founder, Frederic Ozanam, wrote: *They (presidents of Conferences) are requested to remind frequently the meetings over which they preside that the end of the Society is especially to rekindle and refresh in the youth the spirit of Catholicism, that fidelity to meetings, and union of intention and prayer are indispensable to this end, and that visiting the poor should be the means and not the end of our association.* (“**Life in Letters**,” August 11, 1838)

The Society does not exist to simply do works of charity. It exists to help the members grow in spirituality, fellowship and service – a blend of all three. And, the one place where all three come together is in the Conference meeting.

Therefore, it takes all members available to constitute a meeting. A Spiritual sharing is part of a meeting but by itself does not constitute a meeting.

What Counts as a Conference Meeting?

Revised May 2014 

BRICKS to build the foundation

TOPIC: Recruiting New Vincentians

DATE: July 2007

CATEGORY: General Information 

Revised April 2014



How Conferences Shoot Themselves in the Foot

The *Invitation to Serve* is a recruitment program sponsored by the Society both here in the Diocese of Phoenix and throughout the country. The program was designed and piloted here in Phoenix and then promoted throughout the country. It has been a truly successful program for those who have followed it. Following the program is the key. Our greatest success from this program is when a Conference takes the program booklet and uses it as a formal procedure map. Less success has occurred when Conferences vary the details of how the program works.

- The program is keyed around the ability of the Conference members to do pulpit announcements to invite their fellow parishioners to join their ministry. Replacing these pulpit announcements with a ministry fair usually will reduce initial response to at least 10% of that of the pulpit announcement – you lose nine out of a potential ten interested people.
- Generally speaking, having the pastor (or someone from outside of the parish) make the pulpit announcement instead of the Conference members will also bring in less results.
- Sometimes creating your own pulpit announcement will have a negative effect. The sample announcements that are presented in the program booklet have been proven to work.

- The orientation meeting is truly important because this gives the potential members a true flavor of who we are in a one hour time frame. Conferences often create their own program or (WORSE YET) skip the orientation meeting altogether and invite candidates to a Conference meeting. Experience has shown that this has chased people away because of confusion about what is going on and bickering or arguments between members make the meeting uncomfortable for the new comers.

So, following the program as it is designed is truly the best way to go.

Now let's consider the biggest problem we have. Follow up with the newcomers is critical. Everyone who has interest in joining an organization generally wants two things: they want to be welcome and they want to do something meaningful. Here is where some of our Conferences fail.

After the orientation, you invite people to come to a Conference meeting and become actively involved. What usually prevents people from getting involved?

- 1) Existing members do not include them in what they are doing. Some will say: "I already have a home visit partner; you'll have to find someone else to go with." "Working in the pantry is my job; check with the President and get something else to do." Ownership of what we're doing can create a huge block wall to have to overcome. These problems can be eliminated if the Conference President before the new members start goes to each existing member and assigns a new member to do the job but overseen by the existing job holder. Then after the new members have a start the President can negotiate the jobs with the existing members.
- 2) Allowing newcomers to simply come to meetings without letting them participate in the works will make them feel there is no purpose in them being there.
- 3) There is the new requirement that we all have to deal with. Everyone involved in the Society has to go through *Safe Environment Training*. This is a requirement of the Diocese of Phoenix. We need to check with our pastors to be sure they will allow new people who have not gone through the program to go out on calls with someone who has. If this is not allowed and if we haven't made sure the program will be offered conveniently in the near future, then, we have invited people to join something they are not allowed to participate in -- a true failure on our part. Don't blame the pastor. Blame yourself for not being properly prepared.

We recommend that when you invite people to join the Conference, you should immediately assign one of the existing members to be their mentor. This member would teach them the in's and out's of the Conference (pantry work, home visits, paperwork requirements, etc.) as well as go with them through training and make them feel like they are part of the group. Unless you make them feel welcome and give them something meaningful to do right away you will lose them. ☀️

BRICKS to build the foundation

TOPIC: Collaboration Between Conferences

DATE: October 2007

CATEGORY: General Information ☀

Revised April 2014



United by the universality of our call and Vincentian vocation, the organization allows Conferences and Councils to function in a variety of ways as long as the group is operating within The Rule, Bylaws and guidelines of the Society and its governing Councils. By the very nature of our Society, we have been formed to be at the same time different and the same. We all pray the same prayers, follow the same formats and serve the same people. Yet we meet at different times and places and speak in different languages. Always we are called to be one and yet many.

Often misunderstood, diversity is often poorly tolerated. While initially intrigued by differences, we often judge individual and group differences to be less than we are. Our differences are often the source of conflict and misunderstandings between Conferences and Councils. It is easy to get stuck and believe that our way is the right way and that others are wrong, misguided or at minimum less effective than we are. Often we get frustrated when we attempt to contact another Conference to see what they have or could do for a client.

Amidst our struggles to work together, it is important to remember that as Vincentians we are called to minister and to accept one another even before we reach out to others. How can we find Christ in the faces of the poor if we cannot find Christ in our brother and sister Vincentians?

Often, we as Vincentians and our guests feel like we are getting passed around, ignored or shuffled from one place to another. In such cases, establishing a protocol or procedures for collaboration can be very helpful. To establish a protocol, representatives from each Conference and/or Council involved should meet with one another. Each Conference and/or Council

should have the opportunity to present their operating procedures and how they deal with calls, etc. Difficulties in accessing the resources of the other should be talked about. Through sharing, discussion and consensus, a new protocol can be developed and taken back to each Conference and/or Council for approval.

Collaboration between Conferences

Revision 10-15

Often, Conferences will receive a call for help from someone outside the Conference's geographic boundaries. In order to provide order, clarity and a well-defined sense of which Conference is responsible for what, Conferences should generally serve only those within their geographic boundaries. This ensures accurate client history, simplicity of record keeping and helps to prevent instances of "double dipping".

If, however, Conference A receives a call from someone living within the boundaries of Conference B, then the following should ordinarily apply:

- Conference A should refer the caller to Conference B. No promises of assistance should be made to the caller seeking help from Conference A. Conference A may also choose to refer the individual to other possible resources for assistance.

- Except in the case of lack of resources, Conference A should honor the decision of Conference B if they have declined assistance to the caller.

- In the case of a lack of resources, an especially large need, or some other extenuating circumstance, Conference A may offer to assist Conference B in giving assistance to an individual. Due to the nature and possibly the size of the requirement, District Council funds may also be utilized. All assistance **and client contact** should normally flow through Conference B. Except under extraordinary circumstances, Conference A nor should the District make direct payments to landlords, utilities, or others with whom we are working to assist the client.

- Under unusual circumstances, Conference A may grant temporary, emergency assistance to someone living within the boundaries of Conference B, but they should refer the client to Conference B for future assistance, and notify Conference B of any assistance that may have been given.

- If crossing boundaries is a regular occurrence, Conference A and B should establish a normal contact list for consultation.

Collaboration Between Conferences

Revised October 2015



BRICKS to build the foundation

TOPIC: Safe Environment Training

DATE: February 2010

CATEGORY: General Information ☀

Revised April 2014

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

Since that time, Bishop Olmstead and the Phoenix Diocesan Safe Environment Office have adopted policies and procedures that include participation in a training program known as *Safe Environment Training*. These policies, procedures and training requirements apply to all members of the Society of St. Vincent de Paul who minister within the Phoenix Diocese.

According to the policies and procedures of the Catholic Diocese of Phoenix as of July of 2009 all members of the Society of St. Vincent de Paul within our Diocese must:

- 1. attend a *Called to Protect for Ministries* class**
- 2. complete and submit to their parish a Volunteer Application**
- 3. annually complete a renewal course either online or in-person through a class**

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

There are no exceptions to this requirement. All Vincentians must complete this course before they can serve as full or associate members of any Conference operating within the Diocese of Phoenix.

For Youth participation in SVdP activities or further questions, please contact the Safe Environment Training Coordinator in your parish. ☀

BRICKS to build the foundation

TOPIC: Diocesan Food Drive

DATE: October 1996

CATEGORY: Food & Pantry 

Revised April, 2014



The Annual Diocesan Food Drive has been a tremendous boom to the Conferences of the Society. Food pantries will be bulging, at least for a little while. In order to take full advantage of the food that is given to us, we must take time to plan and prepare for the overflowing generosity of our donors.

In your food drive packets, you were given some suggestions for a timetable and recommendations on how to proceed. And, if you have been involved in the drive in past years, you probably have some proven ideas for making the drive a success in your parish. However, we all need to be open to new ideas; and we just happen to have a few to share with you. Each of the ideas that are described below has been used in the past by the Conferences indicated. There are no copyrights or patents pending – mix, match, blend these with your own proven methods.

Getting our Youth Involved



All Saints (Mesa) – We utilize the youth of our parish, especially those needing service hours for Confirmation, and adult chaperones with trucks. We go out into the neighborhoods with grocery bags, going door to door, filling them up. We start about 10 a.m. and finish up at noon. We do this for two Saturdays.

Neighborhood Supermarkets Lend Their Carts



Some conferences contact a local supermarket and borrow several shopping carts. We patrol the church parking lot and, when people bring in the food, we are able to meet them at their cars and put the food bags into the shopping carts. Then it is easy to transport it to the pantry or the sorting area. Running these shopping carts is a good project for the teens.

Get Sturdy Boxes from Local Merchants



Conferences also start a month ahead collecting standard-size paper boxes (11" x 17") from area printers, quick copy stores, even the places where your Vincentians work (any copy machine probably has a box or two nearby). Mt. Carmel used 150 boxes each in the past two years. Using boxes all the same size makes stacking easier. And food is easier to sort and divide if you are giving part to another Conference. Buy a roll of 4" wide white masking tape and put an 11" strip on the end of each box. With a wide mouth marking pen, write on the tape: *peas, corn, stew, sugar, dish soap, etc.* Place the boxes side by side on long tables arranged in a big U in the parish hall and many parishioners will sort their own donations when they bring their bags in.

Special Opportunity for Smaller Children



Ask the pastor if children can bring their "offering" up to a special place at the side of the altar during the Offertory of the Mass at the children's or family Mass, if you have one. This helps get young children to identify with their obligation to help the poor. Not efficient, but efficacious.

Carry Over and Be Available a Second Sunday



Collect food over two consecutive Sundays. People forget to bring the bags, are sick, are away, missed getting a bag, etc. A second week collection catches these people. For the same reasons, try passing out the food bags on two consecutive weekends. You'll find about a third of your parish missed getting a bag the first weekend.

Diocesan Food Drive

Revised April, 2014

Doing the Collecting and Sorting Outdoors



Instead of having parishioners deliver the food to drop off points in pickups, we use our plaza as a drop off point, some conferences set up boxes in a semi-circle around our plaza, which is located near the entrance to the church. Tables are also set up for the purpose of being used by our parishioners to leave their food bags.

All of the boxes are labeled with various food products and each worker then takes a food bag from the table and properly sorts the contents into the labeled food boxes. When the box is full, we place the cover on it and then set an empty box on top; thereby keeping the same order of where the food products are located and it makes it easier to sort. At the end of the day, we pick up all the boxes and store them in an area allocated for our food products.

Our Conference members show so much enthusiasm about collecting and sorting the food that by the end of the day when we have the real hard work of moving the boxes, many of our parishioners join in and help.

When the parishioners see us working in the plaza, it serves as a reminder to them that they forgot to bring a food bag for the drive and the following weekend we receive more food bags. The manner in which our food drive is conducted gives us a lot of exposure to our parishioners. They keep us supplied throughout the year with canned goods.



If you have other ideas, please send to Vincentian Support Services for publication in the Vincentian Newsletter.

Diocesan Food Drive

Revised April, 2014 

BRICKS to build the foundation

TOPIC: Pantry Shelving

April 2008

CATEGORY: Food & Pantry 🌞

Revised April, 2014



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

- **Wooden shelves** must **not** be used because they are too porous and spilled liquids would be absorbed in the shelving possibly causing a health problem.
- Also, wood is discouraged as a material for the framework of the shelving. The better material for the framework is metal.
- **Plastic/vinyl/fiberglass shelves** are not appropriate because they typically are not strong enough to hold the weight of many of the food items.
- The **best material** to use is **stainless steel** shelving or **stainless steel mesh** shelving. The likelihood of contamination is minimal with **stainless steel** material and it is normally very strong.
- Toxic materials or non-food liquids (such as liquid detergent) must not be stored on the same shelf as food items nor on the shelves above those containing food items.
- **Nothing should ever be stored on the floor.** 🌞

BRICKS to build the foundation

TOPIC: NO Food Repackaging

June, 2003

CATEGORY: Food & Pantry 

Revised April, 2014

Food Repackaging is not recommended nor allowed by the Council, as this required a repackaging permit. To repackage any non-processed food such as beans and rice the Conferences MUST secure this permit and be subject to health department inspections on a periodic basis. The Council does not recommend any Conference obtain a repackaging permit as every package must contain a label with date and other specific packaging information as required by health codes.

The following are some of the requirements and special considerations to be considered if a Conference wants to repackage processed food:

- the Conference must have a packaging permit;
- repackaging must be done in an approved clean room with special equipment;
- those people doing the repackaging must have a food handler's cards;
- clean containers must be used (such as stainless steel) and must be cleaned when changing products;
- each package must have a required label;
- flour and similar products require controlling dust by ventilation and breathing masks.

All of the preceding rules are issued and enforced by county health departments.

Repackaging of food becomes a difficult process and not one that should be practiced by the Conference. Many Conferences repackage some types of food as a way to stretch their budget and better serve the poor, **but the possibility of contamination and liability does not justify the effort.**

It has been pointed out that some benefactors give the Conference fifty or one-hundred pound

bags of beans, rice, sugar, coffee, or flour. The Conference would be better served if they had received 25 or 50 two-pound packages of these and other prepackaged food items. Sometimes just putting the information out to our supporters is all that is necessary for that to happen.

Should a Conference receive a quantity of large sized commercial products such as sugar or flour with current dating and not broken packages, they may consider bringing it to the Dan O'Meara Center on Watkins for kitchen use.

It has been our desire that the Food Reclamation Center make it as easy as possible for Conference members to make up and deliver food requests. For the most part all items are packaged and sealed. It then becomes only necessary to take items off the shelf or out of the freezer to fill an order and deliver it. If you think that we can improve this process, your suggestions and ideas will be appreciated.

NO Food RePackaging



Revised April, 2014

BRICKS to build the foundation

TOPIC: Christmas in Arizona Adopt-a-Family

DATE: September 1997

CATEGORY: Administration 

Revised April 2014



Conferences can participate in the Diocesan Council of Phoenix Adopt-a-Family Program. This is a program which puts two of our missions into action: *servicing those in need*; and *giving others an opportunity to serve*. We match up families in need with groups or individuals who would like to sponsor them by providing Christmas gifts and food for a Christmas dinner.



The program is relatively simple in concept. The following is a brief description of the basic steps required to make this program a real benefit to all involved.

1. Each Conference assigns one or two members to act as Liaisons or Coordinators.
2. The Liaisons contact the Sponsors of the previous year to thank them and to ask if they will Sponsor once again.
3. A general solicitation is generated to the parishioners and to businesses in the parish area to seek new Sponsors. This is done through bulletin announcements and letters sent to organizations and businesses. In addition, the Diocesan Council will advertise throughout the Diocesan area seeking Sponsors for the Program. As Sponsors call in, the Council staff will contact the Liaison with information about the Sponsors.
4. Conference members select Families to be sponsored and a home visit is made to each Family. The Conference liaison assists the Family in completing a Family Profile Form, identifying needs and sizes for each family member living in the household.
5. The forms are then given to the Liaison to match up with Sponsors. This Liaison makes the contact with the Sponsor and gives them the information about the family in need. **It is important here to ensure that there is no communication breakdown.** Make the match as quickly as possible and follow-up with both the Sponsor and the Family to make sure all is going as planned.
6. As Christmas gets closer, **continue to do follow-up**, insuring that the families still live at the location indicated and that the Sponsors are following up on their commitments. **Thank You** letters should be sent to Sponsors after the program is completed soliciting their comments and recommendations for improving the Program for next year. 

BRICKS to build the foundation

TOPIC: Preparing For an Up-Coming Election

DATE: April 2003

CATEGORY: Administration ☀️

Revised April 2014

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

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

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

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

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

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

- Therefore, teach that the secret to success in this job is delegation and real sharing of responsibility. This lesson is best taught *by example*, not words.
- If you have someone to groom, get them involved *alongside* you. Remember: you are being a mentor. You should be there to answer questions, to make sense out of the sometimes confusing things we experience in our work.

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

- Starting with the first Conference meeting in the election year, mention that a new President must be elected during the year. Get people to start thinking about this early. Say the prayer (above) at each meeting, asking the Holy Spirit to speak to the person who would make the best servant-leader for the Conference.
- Article 7 in Part II of the Rule states that the Vice President(s) “*organize the election of the next President.*” The first thing is for the first Vice President to appoint a Nominating Committee. Three members is sufficient. Good appointees might be past Conference Presidents, and hard-working rank-and-file members.
- If your desire is that the current Vice President, pantry manager or some outstanding home visit team member be the new President, *don't appoint* to the Committee anyone you think (or hope) will be the new President.
- At a Conference meeting soon after the Nominating Committee is appointed, the Chairperson should ask every person present to nominate someone. The Chair first notes that this is the time for nominations only. No one will be permitted to say “no” during this meeting. Each person is asked *why* they are nominating the person -- strengths, experience, education, love for the poor, love working with them, respect they are held in the parish, etc. This helps “build” the nominee(s) psychologically. Then announce that everyone is to think about this for a month before the issue will be raised again.

Preparing For and Up-Coming Election

Revised April 2014

During the next month, even people who might have fought off a nomination have an opportunity to think about what happened, reflecting on the fact that so many good people thought so highly of them that they nominated them. They might also conclude that the job wouldn't be so bad because they could call on all those people who had confidence in them.

- The Nominating Committee has the responsibility to contact all existing, active Vincentians, who were not present at that meeting, to encourage them to consider serving, and to secure their nominations. A good candidate for President might simply be overlooked and never asked. Why? Because we presumed she was too busy with her kids, or he travels too much on business, or they are too young to have the experience to lead.

- At the next Conference meeting, have members pledge Committee Chair. This can help convince reluctant nominees to agree to serve. It is especially important for the current President to pledge her/his support to the candidates, for nothing is scarier than to take on a new responsibility without the help and Counsel of your predecessor for several months.
- At a Conference meeting the following month, the names of all the nominees are read again. Only then is each nominee permitted to respond to the nomination. Some will decline and you will hear many reasons, but perhaps one or two (and you only need one) will say “yes.”

OK, WE DID ALL THIS AND WE STILL DON'T HAVE A CANDIDATE

Offer other options that make serving less demanding:

- Utilize temporary, “short” terms. Tough situations are sometimes solved by asking someone with obvious leadership qualities to “just serve until October.” It’s hard for many to refuse such a request. Yet, after settling into the job, many “temporary” Presidents decide they *can* handle the job, actually enjoy the work, and get a real sense of fulfillment and satisfaction. When September comes, they’re willing to run for a full three-year term.

This solution is often used with newly-formed Conferences. The new members aren’t familiar with each other and find it hard to elect someone they want to lead them for the next three years. This “short-term” gives them a chance to get to know each other and later make a more informed decision.

For established Conferences, this option is viewed as a desperation tactic, unless the vacancy was caused by the death or resignation of the President. As with the “snowbird” option, this alternative does not provide the Conference with the stability and leadership it needs.

Preparing For and Up-Coming Election

Revised April 2014

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

A Conference without a full slate of officers is considered to be no Conference at all. If no one steps forward to take the leadership role, this “threat” becomes an automatic action.

Now that you have candidates (or at least one), the next step is the actual election. If only one candidate comes forward, a voice vote may be taken. Usually this results in what is called

“election by acclamation.” The whole Conference gives approval and the election is recorded in the Minutes. If there is more than one candidate, a secret ballot is cast with the Chairperson of the Nominating Committee counting the ballots with at least one witness (often the Conference Spiritual Advisor). The Chairperson reveals the result of the election by indicating simply who the winner is, *not revealing the number of votes*. This process is simple and straightforward. However, the key to the whole process is grooming or nurturing someone for the role early. ☀️

BRICKS to build the foundation

TOPIC: Proper Use of Donated Items

DATE: September 2011

CATEGORY: Administration ☀

Revised April 2014

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

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

There may be occasions where this is inadvertent. However, thinking, *“we have 8 full cases of green beans and I could use two cans for dinner – no one will miss two cans”*, is wrong. *“I need a jar of spaghetti sauce and with all these calls, I won’t be able to get to the store – just taking one jar won’t hurt anything”* is also wrong. If there is an abundance of particular items there is nothing wrong with sharing with other Conferences in your district or with the Reclamation Center.

There may also be occasions where a member takes food from the pantry on a regular basis because they are in need. It may also be that the Conference delivered or gave the member food in the past and they now rationalize that it is permissible to take anything they need whenever they need it. This is totally wrong. If there is a need, it may be necessary for the member to become a guest. If it necessary for a member to become a guest, they should be treated as any other guest; however, for the obvious reasons, it should be handled with more discretion.

There may also be occasions where a volunteer takes food, money, gift cards, clothing, or furniture from the pantry in lieu of payment for the many hours they have volunteered to our Society. Still others may feel it’s appropriate to convert a gas gift card to personal use because of the high cost of gas and justify that it’s only fair because of all the home visits they have to make. To volunteer is to act of one's own free will without any expectation of any valuable consideration. In the true spirit of volunteering, no return is expected. ☀

BRICKS to build the foundation

TOPIC: Communications – From the Top Down

DATE: June 2002

CATEGORY: Administration ☀

Revised April 2014

“Sounds like we have a communications problem!” These words can be heard regularly in organizations all over the world. No matter what language is used, the words don't sound any better. Bottom-line -- there was a *failure to communicate* a plan, a strategy, a policy, or just some special information. What is the result of this *failure to communicate*? Someone, usually the one who really needs to know, does not know what to do, what to say, how to act, where to be or what is coming. Normally, this someone is then criticized for not knowing the vital information. The consequences of this *failure to communicate* could be insignificant or could be serious.

There is no easy solution to this problem that is so wide-spread. Actually that's wrong. The solution is simple -- putting it into effect is tough. The solution is to make a concerted effort to communicate better -follow through is the only way.

What does this have to do with the Society of St. Vincent de Paul? Plenty! We are not any different from other organizations throughout the world in this respect. There are lots of *failures to communicate*. Here are some simple examples:

- The Conference Treasurer provides no report at the Conference meeting leaving the Conference members confused about how much money they have available.
- The Conference President doesn't read his/her mail regularly or doesn't pass on information to the rest of the Conference members about special programs going on or workshops coming up or vital meetings scheduled that they need to attend.
- No one from the Conference has been attending District Meetings for quite a long time and the Conference lost its vote in an important election.
- The Conference President was very slow in sending in the annual report and the Conference was dropped from the Diocesan Council Direct Aid to Conferences List thereby losing \$500 per month in funding from the Diocesan Council and potential loss of twinning from other Conferences. ☀

BRICKS to build the foundation

TOPIC: Escalation Policies & Procedures

DATE: April 20, 2016

CATEGORY: Administration 

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

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

1. Conference Level:

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

2. Escalation to District President

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

3. Escalation to Conference Resource and Concerns Committee

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

4. Escalation to Board

The committee believes that most issues that rise to CRC will be effectively resolved at that level. If, however, issues cannot be resolved at CRC level or the recommendation of CRC is of major significance to the Council, e.g., closing a Conference, the issue would be brought to the Board to discuss and resolve.

- Board discusses and decides on an action to resolve the issue.
- All documentation of process and actions/resolution taken shall be archived.

Concerns and Issues within the Diocesan facility, activities or programs

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

Role Definition

Role of Conference President: take steps to assess the problem and try to resolve. If unable to resolve, refer to the District President with basic facts in a timely fashion.

Role of District President: receive information from Conference Presidents, assess situation, gather facts and take action to resolve in a timely fashion. If unable to resolve, refer to R & C in a timely fashion.

Role of Resource and Concerns Committee: receive information from District, assess, gather facts and discuss to decide best solution. If appropriate, resolve at that level. For major actions, present to full Board with recommendations to resolve the issues.

Role of Board of Directors: hear R & C report and recommendations and determine final action or resolution. Carry out action in a timely fashion. Direct the Secretary to record decision for archives.

Role of Vincentian Support Services: facilitate the use of this procedure as needed.

BRICKS to build the foundation

TOPIC: Voting at General Membership Meetings

March, 2012

CATEGORY: Administration 

Revised April, 2014

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

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

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

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

When time allows, items for consideration are distributed to the individual Conferences and Conference presidents are asked to solicit input from their members so that the matter can be

discussed at a specific General Membership Meeting designated for the purpose of discussion and debate. During such discussions, amendments can be proposed and procedural motions are in order. Once the resolution is in final form, it is distributed again for consideration by each Conference and a Conference vote is taken.

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

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

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

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

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

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

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

BRICKS to build the foundation

TOPIC: International Twinning

August 2001

CATEGORY: Financial 

Revised April 2014

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

For information on International Twinning

The Society is a family. Twinning, the sharing of human, spiritual and financial resources, is the ultimate expression of the love and sacrifice that is present in a family. As a Diocesan Council, we have established an enviable record on twinning, both within the boundaries of the diocese and beyond. We also twin both food and other resources to several Conferences outside diocesan borders, with whom we have a fraternal union.

By twinning, we strengthen our bonds as brothers and sisters, encouraging one another in our common mission of spirituality and charity. We are called to pray for one another as we would pray for our own brother. We are called to serve one another as we would serve our own sister. We may even decide someday to visit one another's Conference and share in their ministry.

As to international twinning, we have made a good beginning. As a Diocesan Council, we twin regularly with regional councils and Conferences. District Councils frequently have their own relationships with international conferences.

Is not the next logical step, in justice and love, for parish Conferences to help support, through regular twinning, a "sister" Conference outside our national borders? We are, in fact, challenged by the example set by our brothers and sisters in Australia, where almost 100% of its Conferences twin internationally!

There is a certain Vincentian beauty in the willingness of even our poorer Conferences to share what little they have with a Conference that has even less. To paraphrase Jesus' words to the Pharisees, "*How can you say you love the God whom you cannot see, when you do not love your brothers whom you can see ..*" We can add, "*and who are standing on your doorstep crying out in their pain and need?*"

The gift of twinning, whether \$50 a month or \$100 a quarter, can help bring about wonders in

many communities. Mother Teresa reminded us, *“we cannot do great things, but we can do little things with great love.”* Our 82 Conferences can do a great deal cumulatively ... as a family.

While the Society is present in 132 countries, Conferences are virtually unable to help themselves in 90% of these nations. A system is in place at the national Council of the United States for the protection of contributors. It assures that all donations go to help the poor by requiring, among other things, that the funds be distributed or used by members of the Society of St. Vincent de Paul.

Make the decision to share part of what we have with other members of the Vincentian family who have far, far less. If your Conference doesn't have a specific location in mind, National can match it with an overseas Conference in need. (*“Overseas” is anywhere outside the U.S.A., including Mexico and Central America.*) The Council General (International) now permits us to twin with national councils, area (district) councils, or Conferences anywhere in the world.

As we consider international twinning, remember that a Conference must twin with a sister Conference of the Society. Giving money to someone else, even to a missionary who may be a former pastor and doing very worthwhile things, is not an appropriate use of funds contributed to the Society.

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

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

A Conference will receive a transmittal letter from the U. S. national office at the time it sends the funds to the foreign country. The president of the National Council in that country is requested to sign a “B” transmittal copy indicating that it has received the funds and has delivered them to the proper twinned Conference or council. When the U.S. national office receives back the “B” transmittal copy, it will send the U.S. Conference a copy.

Making a contribution to a foreign disaster appeal does not mean you are participating in the International Twinning Program. In order to participate in the International Twinning program, you must make a yearly twinning contribution *independent of* any disaster appeal.



BRICKS to build the foundation

TOPIC: Procedure for Conference Annual Audit

February 2013

CATEGORY: Financial 

Revised April 2014

The audit information is influx at this time,

Main categories:

1. Keeping the books
2. Reporting status of funds
3. Appropriate use of funds
4. Personal responsibilities
5. Audits of activities

1. Keeping the books

- a. Up-to-date accurate financial account records at all times.
- b. Conference and Council funds deposited regularly and promptly.
- c. Maintenance of all receipts and disbursements are official records of the District or Conference.

Note: Computer records must follow the same retention schedule.

- d. All disbursement of funds must be by check, credit card payment or ETF's as determined by the procedures of the individual Conferences or Districts with proper supporting documentations.
- e. It is strongly advised that checks never be given to clients and payments never be made in cash.
- f. Safe guard credit of Conferences and Districts by seeing that all due bills are paid as soon as they become due.
- g. Districts and Conferences need to have several people authorized to sign checks, in the event that the primary signer is unavailable. However is not efficient or necessary to require multiple signatures on each check issued.

2. Reporting Status of Funds

- a. Treasurer informs members of District and Conference of financial positions by submitting written financial statements at every District or Conference meeting. Reporting of meeting minutes has a suggested standard format.
- b. Receipt of all funds from any source should be deposited within one week of receipt, and posted to the Treasurer's Journal.
- c. If the District Council or Conference has only Monetary Assets, monthly reports may be limited to a simplified statement of cash receipts and cash disbursements showing the beginning balance, details of cash receipts and disbursements and ending balance. If the District Council or Conference has Physical Assets, then a balance sheet must be prepared monthly. Balances should include all cash resources to include checking, savings, money market, CD's and any other financial resource method.
- d. Both District Council and Conference need to prepare and submit Quarterly and Annual reports.

3. Appropriate Use of Funds.

- a. Client Aid
- b. Disaster Contributions
- c. Domestic and Foreign Twinning.
- d. Dues to Councils (Tithing).
- e. Contributions to Upper Councils.
- f. Fund Raising.
- g. Operational Expenses.
- h. Other.

4. Personnel Responsibilities.

- a. The Conference or District Council President may appoint one or more Assistant Treasurers to serve during the term of the President's office. The Assistant Treasurer shall in the absence or disability of the Treasurer perform the duties, exercise the powers, and be charged with the responsibilities of the Treasurer.
- b. In keeping with the spirit of **The Rule** of the Society and sound fiscal policy, the Treasurer of the Conference or District shall not be a member of the District's or Conference's President's immediate or extended family.
- c. The following subjects are detailed in the manual "How to Run a Conference", and are strongly advised to be reviewed in detail for answers to questions about the following topics: Setting up a bank account, Journal/Ledger, Protecting valuable forms, Legal requirements, Confidentiality, and Common sense rules to avoid potential problems and reports.

5. Audits of Activities

Each Conference and District is, first, accountable for their resources, record keeping, reporting and record retention, and second, is part of an organization that is registered as a qualifying charitable organization under section 501 © (3) of the IRS code, and must conduct their business properly in order to not jeopardize that status.

- a. Audits need to be performed annually for each District and Conference. They may be conducted by two or more members of the Conference or District not associated with the Treasurer's position or by a qualified non-member such as a CPA or Certified Internal Auditor. But at the time of a change of officers, the audits must be conducted by persons outside of the Conference or District.
- b. October starts the beginning of a new fiscal year. This would be an appropriate time for an audit. Many Conferences and Districts also have a change in Presidents and slate of officers.

Auditing includes a review of District and Conference **procedures**:

- Reconciled monthly bank statements for fiscal year submitted to required members.
- Receipts for all checks written and all EFT debits kept as backup.
- Receipts for all credit cards of Electronic Fund Transfer kept as backup.
- Copies of all deposits made in fiscal year.
- Copies of Treasurer's reports given to Conference and District members at each meeting.
- Check to see if quarterly and annual reports reflect true status of District or Conference and are the reports completed in a timely manner.
- District or Conference tithing to the next higher level.
- Quarterly and annual reports for fiscal year.
- Are required receipts provided and copies kept, to benefactors who make individual donations of \$250.00 or more?
- All records transferred to the incoming Treasurer in a timely manner.
- Does the District or Conference adhere to the suggested record retention schedule?
- Is the Secretary's minutes included in the records for each month?

Upon completion of the audit, the written results must be shared among the District or Conference members.

APPENDICES:

- Auditor's Guide – provides guidance to the auditor as the procedures to be taken for each of the seventeen audit steps.

- Seventeen Steps from the Annual Audit Work Sheet – provides information to the conference as to why they are doing each step of the audit and what is being accomplished.
- Checklist of Items Needed by the Conference for the Annual Audit – identifies the items needed to be pulled together by the conference for the auditor. This saves time if all the items are readily available.
- Annual Conference/District Audit Report – after the audit is completed and the auditor reviews the work completed and all notes taken, a report is prepared using this report format.
- Record Retention Suggestions – lists the period of time that each document must be retained by the conference. 🌞

AUDITOR'S GUIDE
Annual Audit Work Sheet 

This is a guide to be used by the Auditor, not the Conference. It provides suggested audit steps and procedures that the auditor should consider using for each of the seventeen steps included in the Brick.

1. Verify Bank Statement Reconciliation for the most recent month, completed fiscal quarter and fiscal year end.
2. Verify that Bank reconciliations are retained for three (3) years and Bank Statements are retained for at least (7) years.
3. Are cancelled checks and /or credit cards or Electronic Fund Transfer activity returned by the Bank to the Treasurer?
4. Are cancelled checks filed in an orderly manner? If cancelled checks are not returned by the bank, are check registers filed in an orderly manner?
5. Verify that cancelled checks or checking account statement, checking and savings registers, money market and CD's statements are retained for at least seven (7) years.
6. Are all expenditures made by Bank Check? Detail any exceptions noted.
7. How are blank Bank Checks controlled?
8. List all Current authorized signatories on the District or Conference's checking account.
9. Does the District or Conference have a bank saving or investment account? If so, detail such accounts on an attachment and verify reconciliation of monthly (quarterly) statements and retention of documents.
10. Select several bank deposits from the Bank Statements which have been verified. Locate source documents for these deposits.
11. In order to verify that the records are accurate, select a paid item be picked out of a clients' file and tracked back to the Conference receipt and then tracked to the bank statement. Then a random item is to be picked from the bank statement and tracked back to the client file or expense item of the Conference or district with the appropriate documentation. This needs to be repeated at least three (3) times. In addition, specifically select some expenditures where checks were written to reimburse District or Conference members. Locate receipts for these expenditures. Do these appear to be

legitimate expenses. List the number tested, type of expense and any exceptions where receipts could not be located on an attachment.

12. Are invoices/receipts filed in an orderly manner and retained for at least seven (7) years?
13. Does the Treasurer provide the District or Conference members a written report of income, expenses and total assets on hand at each District or Conference business meeting?
14. Using the previously selected income, expenditures and supporting detail determine that income and expenses are properly categorized on the Treasurer's Journal, Quarterly Reports and Annual Reports. List any exceptions on an attachment.
15. Are Quarterly and Annual District or Conference Reports completed and submitted to District and Diocesan Councils in a timely manner?
16. Retention Schedule:
 - A. Verify Annual District or Conference Reports and Conference letter of Aggregation are retained indefinitely.
 - B. Verify case records/cards and any computerized records are retained for (3) years. Verify back up diskettes/DS's are retained for that same period.
 - C. Verify Meeting Minutes or Minutes Book are retained for seven (7) years.
17. Are properly worded written receipts provided to all benefactors who have made individual donations of \$250.00 or more?

Note: Auditors, in addition to providing written answers to these questions, make sure there are answers to the twelve (12) procedure questions listed above. 🌞

HELPFUL INFORMATION TO UNDERSTAND THE AUDIT

SEVENTEEN STEPS FROM THE ANNUAL AUDIT WORK SHEET

Step 1: Verify Bank Statement Reconciliation for the most recent month, completed fiscal quarter and fiscal year.

Reconciliation is similar to having two of the same jigsaw puzzles, but with different pieces missing in each. You have to put all the pieces together so that the two pictures are identical. In your case, you and the bank have two different sets of records for your bank account with each having missing different parts. Cash is critical to your conference; therefore it is important to know how much you REALLY have. The Auditor is checking to make sure that you are doing this most essential function.

Step 2: Verify that Bank reconciliations are retained for three (3) years and Bank Statements are retained for at least seven (7) years.

Internal Revenue Service (IRS) requires that certain records are kept for a period of time before they are disposed. The Auditor is checking to make sure that you are complying with IRS regulations.

Step 3: Are cancelled checks returned by the Bank to the Treasurer?

Having cancelled checks returned to you by the Bank was typically done prior to the widespread use of the Internet, but much less so now. However, if you do elect to have them returned, they need to be stored with all the other prior year documents you retain. Your answer to this question tells the Auditor what documents he/she needs to check in the next step.

Step 4: Are cancelled checks filed in an orderly manner? If cancelled checks are not returned by the bank, are check registers filed in an orderly manner?

If checks are returned, it is customary to file them with the bank statement and the bank reconciliation for the month in which the checks were received by the bank. The checks for each month should be filed in ascending order by check number. The auditor is checking to see if you keep them in a meaningful order that will allow easy access.

If you **do not** have checks returned, then you should keep a check register which could be your manual Treasurer's Journal or a special report from a computerized accounting system. The check register shows all checks that were written during the month. It is a good practice to keep a copy of the "check register" for each month along with a copy of the Bank Statement

HELPFUL INFORMATION TO UNDERSTAND THE AUDIT

and the Bank Reconciliation. The Auditor is checking to see that you retain these records in a systematic way.

Step 5: Verify that cancelled checks or check register are retained for at least seven (7) years.

This is done for the same reason as explained for step 2.

Step 6: Are all expenditures made by Bank Check? Detail any exceptions noted.

For your conference it is probably best to use checks rather than cash for any expenditure you make. Checks are better because they are written evidence that payments were made. The Auditor is looking to see the purposes for which cash is used and to make sure that these payments have appropriate documents supporting them.

Step 7: How are blank bank checks controlled?

A blank check is one that you have not used, yet. Most conferences have boxes of these. These are almost as good as cash because anyone can potentially take them and use them. Ever had anyone charge something against your credit card? This is the same thing, but instead, they are using your checks.

To keep this from happening, you need to set up something called "Internal Controls," which things are done to prevent the loss of your assets. At home, you have Internal Controls, which are door locks, alarm systems and even safes. There are two good safeguards to use for you conference's cash: 1) secure the checks at **ALL** times, and 2) frequently verify that no checks are missing. Here are a few things to do.

1) Secure the checks at all times.

- a. Lock the checks up at ALL times that you are not using them and allow access to that place to the fewest number of people practical.
- b. **Do not give checks out to teams making home visits and do not allow the home visit teams access to the checks.** This can be a logistics nightmare since usually no one Vincentian is available at all times to dispense checks to home visit teams at the exact time that they need it. **If you can't get around this requirement** handily, then one way to do it is following:
 - i. Set aside a small number of checks that the teams can get to, but keep the bulk of the checks in another secured location.

HELPFUL INFORMATION TO UNDERSTAND THE AUDIT

- ii. Make up a check sign-out log that team members must sign if they take a check. **(NO TEAM CAN TAKE A CHECK BEFORE THEY LEAVE TO MAKE HOME VISITS FOR THE “JUST IN CASE I NEED IT” REASON.)**
- iii. If this system is used, then the Treasurer should verify no less frequently than once a week that all checks are accounted for. This means the check number of the next physically available check corresponds to the check number that the recordkeeping system says should be next. (Example: The recordkeeping system says that the last check used was 364; therefore, the next available check should be 365. That means that a physical inspection of the checks should show that the top one is numbered 365.) If it isn't, then the Treasurer needs to find out what happened.

Obviously, the Auditor is checking to see if you have proper Internal Controls. Since you are pledged to be good stewards of the money given to your conference, you should take the role seriously and appreciate any advice you receive from the Auditor about how to improve your Internal Controls.

Step 8: List all current authorized signatories on the Conference's checking account (and any other accounts).

The processes recommended by SVdP are that at least three (3) people are signatories on **each account**. **Always** have more than one signer. The Auditor is checking for compliance.

Step 9: Does the conference have a bank savings or investment account? If so, detail such accounts on an attachment and verify reconciliation of monthly (quarterly) statements and retention of documents.

Whatever financial institution – bank, credit union, investment banking firm (such as Merrill Lynch) – you must reveal that to the Auditor. No one person, conference, district or council “owns” its money. We are merely stewards, so we can't be possessive, but we must be transparent. The Auditor is checking to see what accounts you have set up and if you are properly reconciling those accounts each time that you receive a statement and reporting them in your quarterly and annual reports.

Step 10: Select several bank deposits from the Bank Statement which have been verified above. Locate source documents for these deposits. Are Bank deposits retained for at least three (3) years?

HELPFUL INFORMATION TO UNDERSTAND THE AUDIT

For all of the deposits you make, you keep what is called an “Audit Trail,” which is the trail of documents that lead up to the actual deposit being made at the bank. Here is the trail from the beginning for a deposit:

- 1) Cash and Checks
- 2) Deposit Slip (also called Deposit Ticket) prepared by Treasurer that lists all the cash and checks going into the deposit.
- 3) Deposit Receipt, which is given to the Treasurer by the bank when he/she makes the deposit.

A customary process used for deposit making is:

- 1) Make photocopies of the faces of all checks – the side where the writing is. Several checks can fit into each 8 x 11 photocopy.
- 2) Prepare the Deposit Slip and take a photocopy of both sides.
- 3) After the deposit is made and a Deposit Receipt is received, staple the Deposit Receipt, Deposit Slip and check copies together and file.

This is the Audit Trail from the beginning to the end and is a logical way of keeping your documents together. The Auditor is checking for the “source documents” for several deposits. The best collection of “source documents” is those contained in the Audit Trail.

Step 11A: At random, select several expenditures from the Treasurer’s Journal for the most recently completed fiscal quarter and fiscal year. Locate invoices/receipts for these expenditures. List the number tested, type of expense, and any exceptions where invoices/receipts could not be located on an attachment.

This looks at the Audit Trail from the expenditures side of the fence. For the most part, the Trail starts with you purchasing something such as food or paying the rent or utilities for clients. Sometimes, you order something that is shipped to you, perhaps from the Internet. If you use a purchase order (PO), and I doubt that any of you do, then the start of the Audit Trail is your PO. If you order on the Internet, then the start maybe a print-out of the order that you placed. If something is shipped to you, then you will receive shipping documents with the shipment.

Audit Trail for Expenditure:

- 1) Purchase Order (issued by you if you use them) or any form or other paper that you used to write down what you are getting and how much you expect to pay for it.
- 2) Copy of Internet Order (available on line)
- 3) Shipping Documents (either on the outside of the package or tucked in the inside)

HELPFUL INFORMATION TO UNDERSTAND THE AUDIT

- 4) Invoice (will most likely be the same as the Internet Order if placed on line) but if not an Internet order, it will be mailed, faxed or emailed to you.
- 5) Receipt from company that you pay in a face-to-face transaction. In the case of payments to members, make up a form that they sign showing the date, the amount received by them and the reason.
- 6) Cancelled check or check copy.

It is common practice to keep the Audit Trail together for each transaction, even if you have to make photocopies of some documents. The Auditor is checking Internal Controls to make sure that you have the proper supporting documents for expenditures made by your conference.

Step 11B: Specifically select some expenditures where checks were written to reimburse Conference members. Locate receipts for these expenditures. Do these appear to be legitimate Conference expenses? List the number tested, type of expense and any exceptions where receipts could not be located on an attachment.

Several things are being considered here by the Auditor. 1) Are internal transactions (those with members) properly documented? 2) For IRS purposes, is money being improperly distributed as a dividend to members and violates the requirements for an organization to maintain its 501(c)(3) designation and 3) that funds are not inappropriately given to members as loans or as payments for non-SVdP purposes. ☀

©	Audit Item	ITEM NEEDED 
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BANKRECONCILIATIONS/BANKSTATEMENTS

1		Bank Reconciliation for the most recent month
1		Bank Reconciliation for the most recent completed quarter
1		Bank Reconciliation for the most recent completed fiscal year end
2		Access to Bank Reconciliations for each month of the past three (3) completed years. (If they are in storage, bring them to the Audit location.)
3		Access to Bank Statements for each month of the past seven (7) completed years. (If they are in storage, bring them to the Audit location.)
8		Document from bank showing current authorized signatories
9		Bank or other financial institution statement(s) for the most recent period for any savings or investments accounts.
10		Source documents (a. Deposit Receipt b. Deposit Ticket, Copies of Deposited Checks (if available) all deposits made during current year. AUDITOR WILL SELECT SEVERAL DEPOSITS AT RANDOM FOR REVIEW)

CANCELLEDCHECKS/CHECKREGISTER/DOCUMENTATION

4		Access to Cancelled Checks for the most recent month (if the bank returns checks) - DO NOT REMOVE THEM FROM THEIR STORAGE LOCATION)
4		Access to Check Register for the most recent month (if the bank does not return checks) - DO NOT REMOVE THEM FROM THEIR STORAGE LOCATION)
5		Cancelled Checks or Check Register for each month of the past seven (7) years. (If they are in storage, bring them to the Audit location.)
6		Listing of all Disbursements, both cash and check, year to date (Print out from accounting system or applicable pages from manual system)
7		All Blank Bank Checks (keep them in their normal storage area - DO NOT REMOVE THEM FROM THEIR STORAGE LOCATION). Be ready to discuss how you control blank checks so that they are not used inappropriately.
11 A.		Treasurer's Journal or report of expenditures, and Invoices/Receipts for the most recent completed quarter and fiscal year.
11 B.		Receipts/Invoices and other Documents that support ALL Checks written to Conference Member year-to-date.
12		Access to all Invoices/Receipts for past seven (7) years. (DO NOT REMOVE THEM FROM THEIR STORAGE LOCATION.) 

REPORTS/LETTERS OF AGGREGATION 🌞

	13	Copies of Report of Income and Expenses given to members for each month year-to-date.
	14	Copy of year-to-date Treasurer's Journal if using manual accounting system or copy of year-to-date receipts and disbursements reports from computerized system
	15	Copies of last Annual Report and each Quarterly Report for the current year, and date each was submitted to District President or VSS.
	16 A.	Annual Reports for past seven (7) years and copy of Letter of Aggregation. (If they are in storage, bring them to the Audit location.)
	16 B.	All Case Records and Cards, including any computerized ones for the past three (3) years. (If they are in storage, bring them to the Audit location.)
	16 C.	Meeting Minutes for past seven (7) years. (If they are in storage, bring them to the Audit location.)

BENEFACTOR LETTERS

	17	Blank copy of Benefactor Letter currently used (letter sent to contributors of ≥ \$250) and copies of Benefactor Letters sent out year-to-date.
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GENERAL

Date:	
Conference/District Being Audited:	
Address of Conference/District:	
Persons in Attendance from Conference/District:	
Name of Auditor:	
Year Being Audited:	
Location of Audit:	

WORK DONE

Annual conference (district) audit was performed in compliance with **Article 9 of Part II of the Rule** and with the Brick entitled "Procedure for Conference Annual Audit." The actual work done responded to the seventeen (17) audit steps stipulated in the Annual Audit Work Sheet, which is an attachment to Brick Volume 8, Number 2. The work conducted included certain:

- sampling and testing of documents,
- visual verification of documents to ascertain the circumstances in which they were kept,
- physical review of accounting reports, records and supporting documentation,
- physical review of conference (district) minutes,

- review of a requisite form letter, and
- interviews of conference (district) officers.

All work, including the preparation of the report, was completed in approximately _____ (hours and minutes).

RESULTS

The results of this audit solely are as follow: (State “Compliant” if the results complied with the requirement of the audit step or identify any noncompliant items and the circumstances and causes.) *The auditor will number each Item of the audit to indicate Compliant, Non-Compliant and provide the Conference information on how to improve.*

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

RECOMMENDATIONS

Based solely on the work done and the analysis and evaluation of that work, the following recommendations are made: (One recommendation should be made for each deviation from audit instructions.)

Recommendation 1:

Recommendation 2:

Recommendation 3:

Recommendation 4:

Auditor

Date 

BRICKS to build the foundation

TOPIC: How Funds of the Society are to Be Spent

June 2010

CATEGORY: Financial 

Revised April 2014

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

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

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

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

As our culture becomes more and more complex and as more and more scam charities come on the scene, it becomes extremely important that our Society remains transparent and that we remain vigilant in honoring the intentions of our donors. The groups, organizations, businesses, families and individuals who support us are giving us money and goods to help the poor directly, to do what Vincentians do in a Vincentian way. As members of the Society, we are free to donate to other causes in our own name. We are free to work and help support

fundraising for other worthy causes. We cannot, however, divert funds given to the Society to a cause just because we have determined to be worthy.

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

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

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

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

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

BRICKS to build the foundation

TOPIC: Quarterly and Annual Reporting Why?

October 2000

CATEGORY: Financial 

Revised April, 2014

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

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

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

In order to fulfill this dual obligation, Conferences are to prepare both quarterly and annual reports. But, you might ask, for what purpose are these reports used? The Twinning Committee meets each quarter to review the quarterly reports and decide how the Diocesan funds for Direct Aid to Conferences is going to be spent. The Twinning Committee also creates a list of Conferences they believe are eligible for aid from other Conferences. The quarterly report effectively acts as a report card of Conference activity that can be reviewed and evaluated by the District Council. The quarterly report identifies the income on which the Conference is to tithe 10% to the District Council. This is defined in the *Rule* and District

Council Bylaws as support which each Conference is obligated to provide to the Council. The four quarterly reports can then simply be combined to provide information for the Annual Report.

Use of National Form

The National Council of the United States designed quarterly and annual report forms to standardize the statistics needed by their purposes. The Phoenix Diocesan Council, however, wanted a more comprehensive report that included some schedules and that is the form used for many years by Conferences in our Council. The National Council continues to seek uniformity on the reports submitted by conferences throughout the United States. The Governance Committee of the Phoenix Diocesan Council has worked to begin the process whereby Conferences in our council will now use the National Form beginning with Fiscal Year 2014-2015. The first quarterly report on the National form will be submitted by conferences in January, 2015. The Governance Committee has developed a teaching manual on the National Form and instruction will begin prior to October 2, 2014. The Quarterly Reports will

What is Required?

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

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

Quarterly Reports: The Quarterly Report includes the Quarterly Conference Report, Special Works of the Conference Report, Current and Up-to-Date Membership list, and the Phoenix Diocesan Council Addendum. These reports provide financial information for a three-month period.

1st Quarter – October 1 to December 31

2nd Quarter – January 1 to March 31

3rd Quarter – April 1 to June 30

4th Quarter – July 1 to September 30

Date to Submit: The Conference maintains the original of each quarterly report for its records and submits two (2) copies to the District President. The tithing check should be sent with each quarterly report.

1st Quarter – February 10

2nd Quarter – May 10

3rd Quarter – August 10

4th Quarter – November 10

Annual Report: The Annual Report provides the financial information for the entire fiscal year, which is October 1 to September 30. The Annual Report includes the Annual Conference Report, Special Works of the Conference Report, Bank Statement as close to September 30, and the Phoenix Diocesan Council Addendum.

Date to Submit: The Conference maintains the original of the Annual Report for its records and submits two (2) copies to the District President on November 10.

As indicated in other Bricks, the quarterly reports and annual report is a mechanism for reporting the activity of the Conference to the pastor and parish community.

Remember:

Training related to paperwork is available.

- ***Keep an eye out for the next scheduled workshop.***

In the meantime, if you have any questions, call Vincentian Support Services. ☀

BRICKS to build the foundation

TOPIC: Home Visitation

August 1998

CATEGORY: Home Visits ☀️

Revised April 2014



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

The foundation, the very essence of our Society, is the visiting of the poor in their homes; we must see them in rags, amid all the disorder and distress of their misery, improvidence and discouragement. Such a sight is both a lesson to us, and a motive of devotedness to them” (Joseph Emmanuel Bailly, First Conference President, 1841)

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

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

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

1. Our Vincentian spirituality focuses on our search for Christ in those we encounter. Jesus

told us Himself (in Matthew 25) that when He was thirsty, we gave Him drink; when He was hungry, we gave Him food; when He was naked, we clothed Him; whatever we do for the least of His brethren, we do for Him. We are in search of Christ; humbly we go to Him; only in pride do we ask Him to come to us.

2. *"You are the servant of the poor They are your masters"* (St. Vincent de Paul). The whole concept of being a servant draws us to do for them rather than ask them to do for us. In the Peace Prayer of St. Francis, we find, *"O Divine Master, grant that I may not so much seek to be consoled as to console; to be understood as to understand; to be loved as to love;"* and to this we can add *to have others to come to us as to go to them.*
3. Our act of going to them is a form of sacrifice. We have to give of ourselves, we have to give our own personal time, we have to make an effort to leave our comfortable surroundings and the activities that we were involved in to go to the suffering Christ. Yes, this is a personal sacrifice; it is an act of love. *"If we wish to become friends with the poor and of the poor, then giving of assistance is not what we are doing – the sharing of ourselves is what we are about."* (Robert Fitzgerald, SVdP Australia, 1988)
4. Going to the homes of those who request assistance is the best way to learn about them and their circumstances. At a minimum, it verifies that you were given a correct address, a real address, the family (or families) does reside there, the need for food is real, and the need for the furniture that they requested is real. *"We shall become acquainted with their sufferings, their hopes, maybe even their vices. We shall know what advice we ought to offer."* (Bailly, 1841)
5. The work of the Society is a work of charity, not a business. We strive for efficacy rather than efficiency. It is the quality of our encounter that has a spiritual impact on us rather than the number of encounters. The home visit provides for this quality while enhancing the dignity and self-respect of those we visit.
6. The poor are too often required to go here and go there, travel is not always convenient for them. Oftentimes, the only means of transportation for the poor is walking. It is especially at times like this that we can build their self-esteem by going to them.

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

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

The Conference Resources and Concerns Committee members have made themselves available to come out to your Conference and discuss Home Visitation with your Conference members. If you would like to take advantage of this, call Vincentian Support Services to make arrangements.

Some Excuses Given for Not Doing Home Visits

- Home visits can cause many problems for the Conference.
- The home visit takes too much time.
- During the home visit, the client may ask for more than a Conference can provide.
- It is more efficient to have them come to us; we can handle more families in less time.
- Home visits require more members (**always** go in pairs).
- Home visits require transportation, personal expenses for gasoline and auto maintenance.
- Street addresses are sometimes difficult to find and can cause frustration.
- Visiting the poor in their homes and seeing how they live can cause stress and sorrow.

I sometimes wonder why Frederic did this?! ☀

BRICKS to build the foundation

TOPIC: The Guest Information Card

August 2006

CATEGORY: Home Visits 

Revised April 2014

Few things are as basic to the Society as the Guest Information Card (Card). We all need and use one (most Conferences use several hundred each year). Several Conferences are now paperless and have the information for a Guest on a lap-top computer.

There is a famous Catholic saying, *“lex orandi, lex credendi”* which means *‘so as we pray, so we believe.’* It guides us to insure, for example, that how we act towards the Eucharist during the Mass is not contrary to what the Church teaches about the Eucharist. This concept also applies to our Guest Information Card – what we carry as we visit determines what we ask and how we behave towards our guests. The Card ‘sets the stage’ for our work. It tells us where to go, what to do, and even how to do it. If it screams “bureaucracy” then we will be bureaucrats. If it says “listen with compassion and love” then we will do that.

Our first rule:

- **K.I.S.S. (Keep it Sweet and Simple)**

We are not the DES (a bureaucracy) with a Crucifix on the wall. We are not social service case managers. We are Christians bringing the love and peace of Christ to those who are suffering. We bring the gift of our time and our ears to listen, to understand and to empathize. Bureaucrats bring clipboards to collect data.

THINGS TO DO

There are some basic characteristics of the Guest Information Card (Card) . The Card gets handled a lot and it is recommended it be printed on cardstock (60# index card weight). Some Conferences print on the card on letter size paper, 8-1/2 x 11 and others use 5-1/2 x 8-1/2". Many Conferences to prints Card on a different color card stock each year, giving them a simple, visual way of cleaning out old cases from their file boxes, cartons and cabinets.

Our second rule:

- **Everything on the form should be there for the purpose of helping figure out how to help an individual or family.**
- **Conversely, the Form should contain nothing whose purpose is to provide a reason to deny assistance to an individual or family.**

Many Cards are full of questions which appear to have been put there to answer the question, "wouldn't it be nice to know..." Trouble is we are not the Census Bureau. We are not in the business of gathering a lot of information. We want to appear as well as be the opposite of a bureaucracy.

THINGS NOT TO ASK



DO NOT ask for a **Social Security (SS) number**. By law, the SS number cannot be used for purposes of identification. Worse, with identity theft becoming endemic, you don't want hundreds of records (which you'll have to discard after a few years) with SS numbers on them. Besides, the Social Security Administration says there are nine million invalid SS numbers being used today, so why ask for a number that is probably invalid anyway. There can be a serious liability issue here, so please observe this rule.

BE CAREFUL when asking for a person's **citizenship, race, religion or whether s/he is a member of your parish**. Usually these are irrelevant, or should be, in determining whether or not you will help.

If your Conference keeps records of programs, special services or financial assistance that is only available to Native Americans or Presbyterians or resident aliens or the like, then these may be legitimate questions.

But without such information, asking these questions may violate the law or leave the

appearance that your Conference discriminates *in reverse* by giving preference to citizens or to Catholics or to your own parishioners, etc. We must all be concerned about things which could cause the Society public embarrassment, put its 502(c)(3) tax-exempt status at risk, or simply leave the wrong impression with an executive or senior employee of one of the many foundations which have been generous to us.

As for religion, is it OK to ask, “do you have a church?” (and even this is better handled verbally during the home visit rather than on the intake form). However, it is appropriate only IF you are prepared to offer helpful information to the person based on their response. If a person says they are a Methodist, for example, can you recommend a respected Methodist church in the area to which they might turn for help, support or spiritual counseling? If not, why ask the question.

Conferences that receive funding from the government might have to record race. Yes, some of the activities at the Dan O’Meara Center fall under this requirement, but very few (if any) parish Conferences.

Several Conferences use two different forms: one for food-only requests, another for financial requests like rental, utility and prescription assistance. You can print the suggested Guest Intake Form attached to this Brick without the space for “Income/Other Aid?”, or you can print one form and just ignore that block. A single form avoids making a system complex but it requires additional training lest a new Vincentian collect data for that block just because they see it printed on the form.

- **Tailor your questions to the assistance requested.**

For food, you don’t need to ask much more than the number and ages of the family members. You need more information for financial requests, but still less than many Conference forms.

- **Avoid inappropriate questions.**

There are many questions which, although not illegal, are simply none of our business and intrusive as well, such as a person’s birthday (we ask the age of children since teens consume three times the food of their younger siblings and we need to adjust our food boxes to accommodate them) or the year, make and model of their car.

Included here are questions asking whether the adults attend church “regularly” or if children have been baptized, received first communion, been confirmed, and attend religious education

classes, etc.; how long a person has lived the parish, city and state (“*Sorry, Jesus, we can’t help you because you haven’t lived in Mesa for at least 90 days.*”); questions about a person’s educational background, the date of their marriage, the last time they sought employment, if they are able to work today and, if not, why not.

Asking for a valid Driver’s License before a gasoline voucher can be given is appropriate, but requiring proof of auto insurance is not. The person may be from or going to a state that does not have mandatory auto insurance laws. (We are not here to enforce state law anyway, and no one is going to sue you.)

Finally, asking whether they’ve “sought help from SVdP before” is a demeaning question. It sort of rubs their noses in their past failures. No one likes to be reminded of when they had to ask for help. You should know if they’ve sought help before; you don’t need to ask them.

CREATIVE ADDITIONS

- A **Consent to Disclosure Agreement** is essential on every Guest Information Card. More and more agencies, utilities and other businesses are refusing to work with Conferences without such an agreement, *signed*, in your possession.
- One creative Conference put a small **map of its boundaries** on its input form to insure that volunteers on the phone asked callers if they lived within the parish boundaries.
- Aware of the concerns of its members, one Conference included asking whether there was a **dog in the house or yard**. And we observed several ways of struggling with the old problem of “**blocked calls.**” The dog and blocked call problems can be handled by the telephone volunteer and the response noted on the card, so those questions were not included on the recommendation form.
- Some Conferences included the question, heard less often today, “*how much do you have towards your rent (utility bill, etc.)?*” That is a legitimate and important question that should be drilled into the minds of home visit teams so they remember to ask.
- And, of course, the previously mentioned tactic of printing your supply of cards on a different color card stock each year, giving the Conference a simple, visual way of cleaning out old cases from their files, is worth following. ☀️

BRICKS to build the foundation

TOPIC: The Cost of Gas vs. Home Visits

CATEGORY: Home Visits 

DATE: November 2008

**“Help us to be generous with
our time, our talent and our treasure...”**

This is from the prayer we start every meeting with. It is our commitment as we serve the poor. *It is often the price we are called upon to pay while trying to experience what the poor experience.* Frederic said until we live like the poor, we can never truly understand their needs. We visit, *“to feel the cold that they feel, see the rags on their backs, share the pain they are experiencing.”*

With the current economic situation, we hear of layoffs, financial markets plummeting, foreclosures, businesses closing, and banks/financial institutions failing. For those of us who are retired, we worry about our retirement nest egg. If we are still working, we worry about job security and whether or not our company will continue to prosper. No matter the personal situation, we all have concerns about making ends meet for another month of rent/house payments, utility bills and food costs.

And when making home visits to the poor, we cannot help but be concerned with whether or not we can afford to pay for the gasoline needed to fulfill our ministry.

What are we to do?

Often the first thing a conference explores is not making home visits. *“Let the poor come to us and pick up their food.”* We need to reflect and ask ourselves how we can expect those who are poor to afford gas to drive to us, while we can’t afford the gas to drive to them. We must not forget the importance of home visits from both the historical perspective as well as the Vincentian Rule. We have, after all, done home visits since 1833. It is one of the hallmark characteristics of the Society.

The second thing a Conference can explore is reimbursement for gas. We must remember that we are called to serve the poor *without compensation*. This is an integral part of our historic mission statement. Our time, our gas, and the wear-and-tear on our car are part of what we offer up to the Lord for all the wondrous things he has given us in our lifetime. Everything we have is His, on loan to us.

As Vincentians, we need to be sensitive to those serving with us who may be unable to contribute gasoline or car wear and tear. Alternative jobs within our ministry should be explored and discussed, such as answering the phone in the office, stocking the pantry shelves, or filling food boxes for the home visit team(s). Another option is to match them up with a home visit member who is willing to drive and buy gas. We serve the poor in many ways.

Remember that God is asking us to use our hands, feet and voice (and, yes, maybe our gas) to help those in need. He will reward us for our sacrifices as we know that the benefits of this work are not of this world. The Lord watches over His children and will provide for their needs. ☀️

BRICKS to build the foundation

TOPIC: What Conferences Can Do When They Have No Money

CATEGORY: Home Visits 

DATE: June 4, 2009

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

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

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

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

The Vincentian way is to talk to every person who calls us and whenever possible to schedule a home visit. Home visits give us unique insights into the problems and struggles of those we serve. As we talk with those in need, opportunities to work together arise and important goals and strategies emerge. In the give and take of our conversations, we learn from one another and share each other’s burdens as true friends in Christ.

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

- 1) Hosting job development classes where individuals can get assistance with resume writing, practice interviewing skills and network to obtain employment.
- 2) Hosting a small local job fair where companies seeking employees can interact with potential employees.
- 3) Hosting a Business Exposition where independent contractors and small businesses can publicize their company and services.
- 4) Place a Job Posting area on the parish web site where potential employers and employees can exchange basic contact and job information.
- 5) Develop and expand collaborative relationships with other churches and agencies to increase collective funding to meet financial needs of our families.
- 6) Work with local landlords and utility companies to set up payment plans that will allow the conference and our families to pay over an extended period of time.
- 7) Collect and distribute coupons and rewards certificates to families in need. Many stores and companies now offer incentive programs that can benefit those we serve by giving them free products or significant discounts.
- 8) Provide budgeting classes and/or host speakers who can guide individuals through service program applications or help families start their own small business.
- 9) Schedule a community garage sale and rent spaces to individuals and give spaces to families in need. Money collected from space rentals can go into conference funds and items not sold can be immediately donated to our SVdP Thrift stores. A truck can be scheduled in advance.
- 10) Seek funds from alternative sources. Think about unique ways to do fundraising within your parish or community. Search for small grants or speak to local civic organizations and ask them to make a donation to your conference.

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

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

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

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

BRICKS to build the foundation

TOPIC: Two by Two

CATEGORY: Home Visits 

DATE: June 2010

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

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

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

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

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

We continually strive to avoid the temptation of making the work about us. At times, it might be easier to just take a few dollars out of our own pockets and give it to a family in need rather

than working through the Conference, but such actions fly in the face of our Vincentian mission and our call. How many of us have been tempted at least once to pay for something ourselves that our Conference has voted against? To act on that temptation would be to work against all that the Society stands for and the process we have agreed upon. It would make the work about us and lead those we serve to feel grateful to us not to the God whom we serve.

Our Rule directs us as Vincentians to always minister in twos. Nowhere in the Rule of the Society does it say that there are exceptions to the two-by-two requirement. We do home visits in pairs. We deliver food in pairs. We meet our families to pay their rent in pairs. We visit institutions in pairs. *We never go alone.* We always go together and by doing so we bring God's love to those whom we serve in a way that is truly unique to our Vincentian mission. Being a Vincentian means that we fully consent to living and working through the Body of Christ; a Body that is always and forever based in a community of two or more joined together in mission, love and service.

In the New Testament, Jesus tells us, "where two or three are gathered together in my name there I am in the midst of them" (Mt. 18:20). As Vincentians, we know and believe what Jesus has said to be true. When we as members of the Society enter into the community of two or more, we are able to bring the actual and abiding presence of our Lord to those whom we visit. As teams, we can feel God's presence in a real and unique way, a way that exists only when we are praying and serving within the Body of Christ.

The Bible also tells us that the number two is the means by which truth is assessed. In 2 Corinthians 13:1, we hear that "By the mouth of two or three witnesses every word shall be established." From experience, we know that having two members listen and evaluate the story of those whom we serve gives us a clearer and deeper understanding of their needs and leads us to make better and more enlightened decisions. Sacred scripture supports this concept and tells us that whatever two or more servants of the Lord agree upon shall be considered truth. Community is a vital part of living and working in truth and in love.

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

BRICKS to build the foundation

TOPIC: Privacy and Confidentiality Policy of the Diocesan Council of Phoenix

CATEGORY: Home Visits 

DATE: January 2013

As stated in the Rule of the Society, *“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.”*

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

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

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

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

1. All Conferences must incorporate into their written Conference guidelines statements that determine and define the following items: (See examples)

- a. What information will be recorded. (Record only what is essential to provide quality services.)
- b. Where and how information will be recorded.
- c. How information will be safeguarded.
- d. Who has access to the information.
- e. How long information will be maintained. (*Note - all client records must be retained for no less than three years.*)
- f. When and how information shall be disposed of.

2. Information concerning those we serve may be shared without consent only within the Vincentian family. Sharing information outside the Vincentian family must be done with great care and except under extraordinary circumstances only with the consent of those we serve. See list below for appropriate level of consent.

3. Those being served or seeking service and/or support shall be advised of the protocols and privacy policies of the Conference/Council and how their personal information will be safeguarded and used.

Release of Information Protocol

<u>Type of permission required</u>	<u>Circumstances</u>
Verbal permission:	General types of assistance such as food, thrift store vouchers, referrals or assistance with gasoline or medication purchases.
Case record written consent:	Simple payments for things such as utilities or rent <i>unless the company receiving payment requires a more formal written release.</i>
Formal Release of Information:	Situations that are complicated or require advocacy interactions in which personal information will be shared. Such releases are interaction specific and should apply only to a specific action and limited time frame. (See attached form)
Photo & Media Release Form:	Situations where photos, videos or stories are used for publication. These forms are available through the Community Relations office at Watkins <i>Media items to be distributed outside of your Conference or parish, need to be coordinated through the Community Relations office.</i>
No permission or release:	Situations where the person poses a genuine threat to themselves or others.

Vincentians may not:

- Share personal information about those receiving or seeking service with their own family, friends or persons outside the Vincentian family.
- Release information without informed written consent to any type of media sources.

- Share individual service information with outside agencies or groups such as giving another social service group a list of clients and a record of past services they have received.
- Share information about specific individuals or families receiving service with another individual or family seeking or receiving service.
- Call or notify other groups or agencies about individual service history solely for the purpose of excluding a person from future services.

Examples of written guidelines concerning client information:

Sample 1 - While a variety of notes may be taken during phone conversations and home visits, only basic and pertinent information will be recorded on the client intake and service record/card. All client records shall be placed in a locked file cabinet in the parish office and only active Vincentians will be allowed access to these records. All inactive (old) client records will be shredded after five years where there is no activity,

Sample 2 - Basic and pertinent client information shall be recorded in the Conference computer system and all files shall be backed up to a secure system once every three months. The Conference computer will be password protected and shall be secured in a locked file cabinet at the parish office or personally secured by the Vincentian on-call. All inactive files, files where there is no activity for a period of 3 or more years, shall be purged from the computer. Receipts for payment and copies of Consent Forms shall be placed in the Conference's locked file cabinet or secured in the Treasurer's records.

Sample 3

1. All client files and records shall be secured in the SVdP Food Pantry and only active, authorized Vincentians shall have access to these records.
2. Only basic client and service information shall be recorded.
3. All inactive files shall be shredded after five years of inactivity.
4. All minutes and other Conference documents containing client information must be secured or shredded by Conference members. ☀️



CONSENTIMIENTO PARA COMPARTIR INFORMACIÓN PERSONAL

El abajo firmante ha solicitado que la Sociedad de San Vicente de Paul proporcione ayuda personal.

El abajo firmante ha proporcionado información personal y confidencial al personal de la Sociedad de San Vicente de Paul para asistir en proporcionar la ayuda solicitada.

El abajo firmante le da permiso a la Sociedad de San Vicente de Paul de discutir esa información con otras agencias y personas que son utilizadas en tratar de proporcionar la ayuda solicitada.

El abajo firmante también se compromete a eximir de responsabilidad a la Sociedad de San Vicente de Paul, Concilio de Phoenix, Conferencia de _____ y sus miembros para su uso razonable de toda información proporcionada.

Firma: _____ Fecha: _____

Imprima Su Nombre: _____

Testigos: _____





CONSENT TO SHARE
PERSONAL INFORMATION ☀

The undersigned has requested that the Society of St. Vincent de Paul provide assistance.

The undersigned has provided personal and confidential information to the personnel of the Society of St. Vincent de Paul in order to assist in providing the requested assistance.

The undersigned gives the Society of St. Vincent de Paul consent to discuss that information with other agencies and persons who are utilized in attempting to provide the requested assistance.

The undersigned also agrees to hold harmless the Society of St. Vincent de Paul, Phoenix Council, _____ Conference and its members for its reasonable use of any and all information provided.

Sign: _____ Dated: _____

Print Name: _____

Witness Initials: _____
_____ ☀

BRICKS to build the foundation

TOPIC: Feast of St. Vincent de Paul

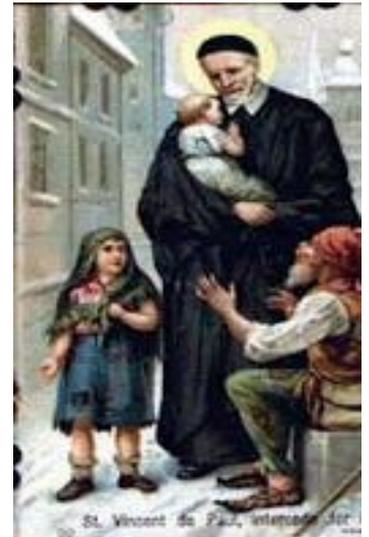
CATEGORY: Spirituality ☀️

DATE: September 1996

Let's Celebrate!!

It's a time to gather, it's a time to remember, it's a time to share. Celebrate this special feast day with your fellow Vincentians, spouses and family members. Make it a day full of memories for you and your parish. Here are some ideas to help stir your imagination.

1. Select a scheduled Sunday Mass which your Conference members, spouses, and family members can attend together. Invite associate and contributing members as well. Ask your pastor to reserve several pews in the center, front of church. After Mass, you may want to go to your favorite restaurant as a group for breakfast.
2. Serve coffee/juice and donuts to members of the parish after morning Masses to thank them for their ongoing support. Have Vincentian literature available; this can turn into a great recruiting opportunity.
3. Perhaps a "Taste of St. Vinnies" (a pot luck where all members bring a dish based on their own ethnic heritage — Chinese, Polish, English, French, German, Greek, Irish, Italian, Mexican, Vietnamese, etc.)
4. Retreat to the mountains for a day of spirituality and fellowship.



Use your imaginations. Add to these ideas. Combine them.
Remember—Celebrate—Believe!

We are the St. Vincent de Paul Society, show it! ☀️

BRICKS to build the foundation

TOPIC: Feast of Immaculate Conception December 8

CATEGORY: Spirituality ☀️

DATE: November 1996



The Feast of the Immaculate Conception has always been one of the four main festival days on which Vincentians are expected to gather and celebrate. This feast day celebration dates back to the very beginning of the Society and can be traced to Frederic Ozanam himself.

Since the earliest days of the Society, members have shown great devotion to Mary, the Mother of God. Prayers before and after each meeting are offered to place us under her protection and guidance in order to persevere in our apostolate and perfect the virtue of Christian Charity.

Ozanam, our principal founder, developed a great spirit of piety by fervent devotion to the Blessed Virgin and this virtue was explicitly expressed in the text of the decree for the introduction of his cause for beatification.

Ozanam at all times reminded members of the Society of St. Vincent de Paul that Mary was the heavenly patroness of the Society. It was Ozanam who, shortly after the beginning of the Society, formally proposed that the Mother of God – Mary Immaculate – should be the heavenly patroness of the Society. It was Ozanam’s suggestion that, at each Conference meeting, the Hail Mary should be said and that the Feast of the Immaculate Conception should be a festival of the Society. Just prior to his death in 1853, despite protests from his wife and friends, Ozanam desired to walk to the Church saying – “This is my last walk on the earth and I desire that it should be to visit my God and His Blessed Mother.”

It is no wonder the tender devotion to the Mother of God – Immaculate Mary – has been, and still is, traditional among the members of the Society of St. Vincent de Paul for she is their Heavenly Patroness. (See Chapter 3, Page 67 of the Manual)

As with the other festival days, it is a time to gather, it is a time to remember, it is a time to share. Celebrate this special feast day with your fellow Vincentians, spouses and family members. Make it a day full of memories for you and your parish. Here are some ideas to help stir your imagination:

- Select a scheduled Sunday Mass which your Conference members, spouses and family members can attend together. Invite associate and contributing members as well. After Mass, say a rosary together. Then you may want to go to your favorite restaurant as a group for breakfast.
- Gather as a group, members and family. Pray and eat together. Have a pot luck dinner in which each member or family brings part of the meal made from their favorite recipes. Honor Our Lady with a rosary and/or a special program – maybe a guest speaker.
- Howl a little! Spread the word and use that feast as a recruitment day for the Society. Arrange with your pastor so that your members can speak at each of the Masses to invite members of the parish to join us in our ministry. Offer coffee and donuts after Mass to those who would like to discuss the possibilities.
- Cook a poor man’s meal and offer it to your parishioners. Invite them to partake and make a contribution of what it would have cost to go out to dinner. Promote the Society, our ministries and devotion to the Blessed Virgin.
- St. Mechtilde once asked Our Lady to let her know what would be the most pleasing salutation with which to address her. At once Mary appeared to her with these words written on her Immaculate Heart in letters of gold: HAIL MARY, FULL OF GRACE! THE LORD IS WITH THEE! Recitation of the rosary, especially in a group, would be most pleasing to Mary, Our Mother. To do this on a regular basis would be more so.



Because of the large Hispanic population in our Diocese, it would be very appropriate for Vincentians, as a group, to celebrate the feast of Our Lady of Guadalupe (December 12) instead of that of the Immaculate Conception. Any of the above recommendations would still be appropriate.

On the night of July 18-19, 1830, Our Lady visited St. Catherine Laboure and, speaking about the entire Vincentian family, left her with these words: *The protection of God will be ever present in a special way – and St. Vincent de Paul will protect you. Have confidence. I will be with you then.* ☀️

BRICKS to build the foundation

TOPIC: Lenten Opportunities

CATEGORY: Spirituality 

DATE: February 1997



Lent is upon us once again and, as we ponder what this will mean to us in our own personal spiritual growth, we should also keep in mind that part of our Vincentian mission is to present others with opportunities to give, to help others and to grow. There are a number of ways that we can come up with to offer a chance for fasting, almsgiving, personal sacrifice and spiritual growth to our members and to parish communities. Listed below are some ideas that you can use within your parish; you may expand, shorten, or mix and match these ideas to come up with some real possibilities.

Liturgy and Soup: A commonly used idea is to offer a liturgy such as Stations of the Cross or Mass followed by a Soup Supper in the parish hall. The Soup Supper would be presented by three individuals who would bring their favorite soup recipe. You could ask people to bring their own bowls and spoons and possibly some bread to share with others. This would be done once each week during Lent and, if done on Friday, the soup should be meatless. Once the meal is shared, the people participating could be asked to make a donation of what it would have cost them to eat out.

Operation Rice Bowl: This idea is used in many parishes to support foreign missions. Effectively, it includes a small cardboard donation box and some promotional material. People are asked to put a certain amount of money into the box for every meal they eat (possibly the amount it would have cost to eat out) and then send the donation in at the end of Lent. This sacrificial offering may not specifically benefit St. Vincent de Paul, but it is an excellent way to keep people in a giving and caring spirit. Given plenty of preparation time, the same idea could be used to benefit St. Vincent de Paul directly.

Attending Lenten Liturgies Together as a Conference: Attendance at daily Masses or Stations of the Cross or any other special Lenten liturgy are excellent ways to promote Conference member spiritual growth. To do so as a Conference activity, not in place of a meeting, would add that much more to the Spiritual benefit. “Where two or three are gathered together in my name, there am I in their midst.” Lent and Easter Time are the primary seasons of the liturgical year. What better time to recognize His presence among us!

Poor Man’s Meal: Another great idea that will include the entire Conference is to prepare and serve a poor man’s meal for the parish community. One menu possibility is to prepare a stew. Hollow out large rolls and use the hollowed out rolls as the bowls. The left over bread can be used to prepare bread pudding. Then arrange to serve the meal for your parish community on a Sunday morning or early afternoon. You may or may not want to ask for a donation for the meal. This idea develops fellowship among the Conference members, sacrificial giving if donations are requested and a feeling of solidarity with the poor.

Attend a Retreat or Day of Recollection: Spiritual growth is the goal of the Lenten season. An excellent way to help develop one’s spiritual life is by participating in a Day of Prayer/Recollection or a Retreat. The Diocesan Council’s Spirituality Committee usually sponsors a Day of Prayer/Recollection during Lent. Promote this and put it in your plans as a Conference activity.

There are many possibilities – almost as many as there are imaginations. Choose one for your Conference and help fulfill the missions of the Society: ***Spirituality, Fellowship, Helping the Poor and Giving Others the Opportunity to Serve the Poor.*** ☀

BRICKS to build the foundation

TOPIC: Lenten Opportunities II

CATEGORY: Spirituality ☀️

DATE: February 1998



Lent is upon us once again and, as we ponder what this will mean to us in our own personal spiritual growth, we should also keep in mind that part of our Vincentian mission is to present others with opportunities to give, to help others and to grow. There are a number of ways that we can come up with to offer a chance for fasting, almsgiving, personal sacrifice and spiritual growth to our members and to our parish communities.

Last year you were sent a with some ideas that you can use within your parish. Dig it out, dust it off, review it with your fellow Conference members. You may expand, shorten or mix and match these ideas to come up with some real possibilities.

On the back of this page is an idea to add to your list. It is one that is being used at Our Lady of Mount Carmel in Tempe.

There are many possibilities – almost as many as there are imaginations. Choose one for your Conference and help fulfill the missions of the Society: **Spirituality; Fellowship; Helping the Poor; and Giving Others the Opportunity to Serve the Poor.** ☀️

What is your family doing for Lent?

Remember your old pastor asking everyone to make a “meaningful sacrifice”? ☀️

Here’s one suggestion. Start with some scissors.

COFFEE CAN CAMPAIGN

During the Season of Lent, we recall the Parable of the Widow’s Mite (**Mark 12.41-44**).

The widow put two small copper coins into the collection (which represented a real sacrifice for her) while Scribes and Pharisees were making a big show of giving large amounts which came from their excess funds. The Lord judged the Widow’s offering to be a better one.

Your family can, through the Coffee Can Campaign, remember the need for real sacrifice during Lent, as shown by the Widow, to help people less fortunate than themselves. Parents can lead by example and suggest a daily offering from each member of the family. St. Vincent de Paul uses these funds to help the poor, hungry, homeless, ill and lonely.

MAKE THIS A FAMILY EFFORT

Dad can put in all the loose change from his pocket each night, and mom the change from grocery and other shopping. Older kids can add their quarters and dimes while youngsters save pennies and nickels. Young adults often have a real awareness of poverty from what they see among their friends and classmates. Ask them to do their part to help those in need.

WHEN: The Coffee Can Campaign runs from the beginning of Lent to Pentecost Sunday (the last day of the Lenten/Easter Season). Your cans and jars will be collected on Pentecost Sunday at SVdP tables set up outside the church. Thank you for helping.



(Note: Glue or tape this to your own coffee can (or mayonnaise jar). ☀️)

BRICKS to build the foundation

TOPIC: Ozanam Sunday (Last Sunday in April)

CATEGORY: Spirituality 

DATE: March 1997

A triple celebration all rolled up into one. We have ample reason to celebrate at this time. First, it is the anniversary of the founding of the Society of St. Vincent de Paul (April 23, 1833). Second, it is the anniversary of the birth of our founder, Frederic Ozanam (April 23, 1813). And third, it is the anniversary of the birth of our patron, St. Vincent de Paul (April 24, 1581). Any one of the three would be plenty of reason for Vincentians to get together and do something special. So let's look at some of the possibilities.



Mass and a Breakfast: Select a scheduled Sunday Mass which your Conference members, spouses and family members can attend together. Invite associate and contributing members as well. Ask your pastor to reserve several pews in the center of church, up front. After Mass, you may want to go to your favorite restaurant as a group for breakfast. If possible, honor some of the founding members of the Conference.



Coffee and Donuts for the Parish: Serve coffee/juice and donuts to members of the parish **after morning Masses to thank them for their ongoing support.** Have **Vincentian** literature available; this can turn into a great recruiting opportunity.



Pot Luck Dinner: Gather, as a group, members and family. Pray and eat together. Have a pot luck dinner where all members bring a dish based on their own ethnic heritage – Chinese, Polish, English, French, Greek, Irish, Italian, Mexican, Vietnamese, etc. Then present a simple program which honors one of the *old timers* of the Conference.



Attend a Retreat: Spiritual growth is the primary goal of the Society of St. Vincent de Paul. An excellent way to help develop one's spiritual life is participating in a retreat. Do a little research and find out what is available. Promote this idea and put this in your plans as a Conference activity.



Meet your Neighboring Conference: Get together with your neighboring Conference either at their place or yours. Have a combined meeting, enjoy a meal together and

invite someone from one of the social service agencies to talk to you about what it is they offer and how you can take advantage of their services for those we serve.

There are many possibilities – almost as many as there are imaginations. Choose one for your Conference and help celebrate this special day in our Society's history. 

BRICKS to build the foundation

TOPIC: Spirituality in the Conference

CATEGORY: Spirituality 

DATE: February 1999

The primary purpose of the Society is NOT to serve the poor. It is NOT our works that are of highest importance. The poor are always with us. We will never eliminate poverty. The work and the opportunity to do the work will always be with us. It is not the work that is important; it is what is behind the work that is important.

“To bear witness to Christ and to His Church by showing that the faith of Christians inspires them...”

(Chapter 3, Page 50 of the Manual) Our **spirituality** is the first and most important aspect of our objectives. It is our motivation (or it should be). And more specifically our Vincentian Spirituality is our guide. Our formation and our growth as Vincentians will not automatically happen by simply going to church on Sunday. It takes effort, it takes emphasis, it takes focus, and it takes regular and frequent reminders. And the place to get this is in the Conference meeting.

Let’s go back to the partial quote from Chapter 3, Page 50 of the Manual. This is under the heading of the **Essential Elements of the Society of St. Vincent de Paul**. *“To bear witness to Christ and to His Church by showing that the faith of Christians inspires them to work for the good of humanity.”* As we analyze this very simple statement, we see that spirituality is alluded to from two different standpoints. The first is that our faith inspires us to do the works. And the second is that bearing witness to our faith has a direct impact on those whom we serve.

Our formation as Vincentians is of foremost importance. This formation is promoted and provided by the Society in many different ways. But, it is important to understand that we speak of Vincentian spirituality as different from Franciscan spirituality or Carmelite spirituality or Jesuit spirituality or general spirituality. Our Vincentian spirituality has a special focus. First, it focuses on the spirituality of service: service to those in need as being service to Christ Himself (Matthew 25:31–46). And second, it focuses on specifically searching for and finding Christ in those we serve. It is not only that we want to serve Christ by serving those in need, but we also want to see Him personally in our brothers and sisters who are suffering.

So how does the Society provide this formation? In our regular **meetings**, we have **opening and closing prayers** and immediately after the opening prayer we have a spiritual reading and

discussion. When new members are brought into the Conference they are welcomed by a spiritual ceremony. The Society schedules and presents Days of Recollection, special feast day celebrations, regular gatherings of the membership and all are led by prayer and in most cases include a celebration of the Eucharist. We not only recommend but insist on each Conference having an active Spiritual Advisor to guide the Conference in its spiritual growth. We make **spiritual literature** available to our members at all major gatherings and encourage them to make use of it. And finally, all of our SVdP literature emphasizes the importance of our spiritual growth.

We are to *bear witness* that our faith is what inspires us. This has a direct impact on those we serve because, at a minimum, we hope that those we serve see our faith in our actions and words. We encourage our members to pray with those we serve and, to the level that they are comfortable, to discuss matters of faith when visiting with our suffering neighbors. Religious articles and literature of all kinds may be given on these encounters. We should also encourage those we serve to build themselves up in their own faith, to go to church regularly, and to pray daily. All of this is a witness that Christ inspires us in our works.

In closing, let us review the Missions of the Society: **Spirituality, Fellowship, Serving Those in Need, and Giving Others an Opportunity to Serve**. All four work together. In fact, they are a mission in unison: our spirituality motivating the others and the others enhancing our spirituality. Works without love are as meaningless as love without works. ☀️

BRICKS to build the foundation

TOPIC: Fellowship

CATEGORY: Spirituality 

DATE: May 1999

The second of the three Essential Elements of the Society is Fellowship and Friendship:

To bring together men (and women) of good will and to assist them by mutual example and true friendship in drawing nearer to the Divine Model by fulfilling His essential precept; namely, the love of God in the person of others.⁶

The key words in this statement are *mutual example* and *true friendship*. We are not trying to develop a simple working relationship between our members; we want to develop a bond between them. “We are family!”

In 2003 a survey was sent to our Vincentian membership. Two of the questions presented were: “1. Why do you remain a member of SVdP?” and “2. What do you value most from your involvement in SVdP?” In answer to question 1, thirty-five people responded that the fellowship with the other members of the Conference is why they remain. And, in answer to question 2, eighty-seven people indicated that fellowship in the Conference (*camaraderie*) is what they value most. The *true friendship* that we promote in our Conference membership is of single importance to our members.

How do we, how can we, develop and encourage this fellowship among our members? We can look at activities that are part of the day-to-day personality of various Conferences. Here are some of those ideas. Pick some and give them a try. They may fit very nicely in your Conference.

Spiritual Sharing. During each of our Conference meetings, we have time set aside in our meeting agenda for a spiritual reading and discussion. This *discussion* is intended to provide both an opportunity to share faith experiences as well as build fellowship. Sharing what you really believe makes you vulnerable in many people’s ways of thinking. This vulnerability also leads to trust and trust to friendship.

Spiritual sharing also includes the fact that we pray together both at the beginning and the end

of our meetings. The words that we use in our prayers call for unity among the members. The prayers use “we” rather than I. And the old adage holds true: the family that prays together stays together. We are family!

Working Together. One of the ways that we help promote fellowship is by doing work as a Conference. A good example of this is to gather as many members together as possible and go together (car pool, caravan, etc.) to one of the Diocesan facilities and work for a few hours. Some suggestions would be one of the dining rooms, the food reclamation center, the kitchen, and there are many more possibilities. You could choose to do something closer to home, such as visiting a nursing home or hospital. Working together as a group (more than 3 or 5) builds friendship.

Member Birthdays. Remembering our fellow Vincentians on their birthdays, anniversaries, or any special celebration helps to develop the bond between the members. This can be done in any number of ways: cards, cakes, Masses are all simple ways of approaching this. For example, one Conference has a birthday cake once each month for all of the members who have birthdays during that month. It is recommended that Conference funds not be used for this purpose; however, the secret collection or a special collection among the members is good candidates.

If You Feed Them, They Will Come. Sharing a meal with someone has significant meaning in many cultures. This fits within our Vincentian culture as well. Picnics, pot luck dinners, going together as a group to a restaurant is all ways of sharing a meal together. Some Conferences get together on special feast days (St. Vincent’s Feast Day, Ozanam Sunday, etc.), some gather only on occasion, some gather at particular cycles. For example, if your Conference meets every Monday, then on those months when there are five Mondays, your Conference can have a potluck instead of a meeting on the fifth Monday. This works for those Conferences that meet every other week also since you can get together for the shared meal on those months when you would have three meetings. 🌞

Meeting with Neighboring Conferences. Another good practice is to invite your neighboring Conference to come to one of your meetings or one of your social gatherings. This helps to create that feeling of friendship with those close to home but not immediately involved in your Conference.

Invite Other Agencies to Meet with You. Many of our Conferences work very closely with other agencies for referrals and in sharing the burden of assistance. It is a good idea to invite representatives from these other agencies to your Conference meeting or social gathering to share experiences and war stories.

Keep Your Cool. We are family! (I think I heard that somewhere.) But family squabbles need to be avoided. At all of our gatherings, remember that we are to be the presence of Christ to each other. Tender love shown in our actions toward each other speaks much louder than all the words we can say. Words can be a very lethal weapon. Never hurt anyone with words. Be kind and loving with each other, for you cannot love Christ in His distressing disguise if you cannot love Jesus in the heart of your brothers and sisters. ☀️

BRICKS to build the foundation

TOPIC: Guidelines for use of Social Media

May 2016

CATEGORY: Technology 

Social Media and the use of it has become an everyday event. There are several risks involved in using Social Media for a Conference. Using technology, including the Internet, opens us up to several risks such as identity theft and bodily harm to Vincentians.

Second concern is the misrepresentation or misuse of the St. Vincent de Paul brand and society.

This brick will outline the guidelines for the development and use of Social Media for Vincentians to maintain a secure reputation of SVDP and to protect our Vincentians.

1. Conference should agree on the purpose and use of these applications.
2. Contact VSS for approval and assistance for development of media.
3. Pages, sites, comments will be well controlled, and non-public.
4. There will be an administrator for each of these within VSS.
5. Access should be limited to Vincentians only.
6. No personal pictures will be shown without the written consent of the person in the picture.
7. Pages, sites, comments will be monitored by VSS.
8. Designs will include appropriate and only approved branding of SVDP.

