



STANDARDS OF EXCELLENCE QUESTIONNAIRE FOR CONFERENCES

(Governed by Resolution 065-04/2009)

1. Does the Conference meet the “Minimum Requirements for Existing Traditional Conferences”? (copy attached)
2. How does the Conference make use of the “Serving in Hope” program?
3. What percent of Conference members have attended Ozanam Orientation? What is the plan for those who have not?
4. What formation/training have Conference Officers and Spiritual Advisor attended?
5. In what ways does the Conference encourage the Spiritual Growth of the members?
6. How does the Conference encourage attendance at District/Diocesan Council Meetings/Training/Social Events?
7. How many members have attended a Regional/National Meeting?
8. How many members serve as Officers or Committee Members for the District/Diocesan Council?
9. What means does the Conference use to raise funds?
10. Does the Conference have a file/list of local resources for the members?
11. Has the Conference established its own internal guidelines for helping people? What are they?
12. Does the Conference review at least annually its spiritual growth, friendship, and services to determine how they can better meet the needs of those they serve and help Vincentians grow in spirituality and friendship?
13. Is the Conference twinning? How and where?
14. What is the Conference plan for obtaining new members?
15. How does the Conference communicate with parishioners/community?
16. Does the Conference enlist the aid of local businesses?

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GOVERNANCE

17. What special programs does the Conference have to help people in need?
18. The Conference goes beyond just meeting immediate needs (such as rent, utilities, food, clothing) by referring our friends to SVdP and/or outside programs designed to help them move out of poverty (check all that apply):
- ___ Special works or Systemic Change programs of our Council or Conference.
 - ___ Catholic Charities and other community or agency programs.
 - ___ Conference program(s) designed to deepen our relationships with our neighbors in need (describe briefly).
 - ___ Advocating for change in local, state, or federal policies (cite examples).
19. How does the Conference make use of District/Diocesan Council Programs to assist people?
20. How does the Conference participate in advocacy?
21. How does the Conference encourage knowledge of the Rule and adherence to it?
22. Has the Conference adopted set of standard Bylaws that conform to those approved by the National Council?
23. Is your Conference under a Council's 501(c)(3) Group Ruling, or your own exemption separate from the Catholic Church?
- a. Council's 501(c)(3) Group Ruling _____
 - b. We have our own 501(c)(3) exemption _____
- Please enter the date your 501(c)(3) exemption was issued _____
- If none of the above applies, please state what steps are being taken to become tax exempt?*
24. Is the financial activity of the Conference included in a 990 that it files annually with the IRS or that a Council includes in its 990?
25. When was the last Conference audit or financial review (whichever is appropriate) completed? Who performed it? What was the scope of the audit or financial review?
26. Does the Conference protect those we serve as vulnerable citizens with safeguarding policies and practices at a minimum in alignment with Diocesan and Parish requirements for volunteers?