NOTE: This document is an adaptation of the “National Council of the United States - Standards of Excellence Questionnaire for Conferences” by the Archdiocesan Council of St. Louis. The intent and primary substance of the National document has not been changed. The St. Louis Council has adapted the National document to better fit the needs of our Conferences and especially the “All Things New” Merging Conferences.

The National Council has provided guidelines of Operational Excellence for Councils, Districts, and Conferences. According to the National Council, all Councils, Districts, and Conferences must implement the listed “Requirements” at each level. Councils are expected to evaluate themselves and report to their Regional SVdP Vice President – which the St. Louis Council has completed. All Conferences in the U.S. are expected to complete the Questionnaire and report its assessment to their District or Diocesan Council.

The St. Louis Council will be asking all Conferences to complete the Standards of Excellence Questionnaire, summarize their findings, and share them with the Council. Subsequently, Conferences should implement the “Minimum Requirements” in a reasonable time frame. Once Minimum Requirements are achieved, Conferences should review the “Questions About Standard Operating Procedures and Practices” section and assess their practices. Finally, building on the solid foundation they have created, Conferences should strive to implement the “Best Practices” which they are capable of and have the capacity to implement.

For Conferences following the “Phased Merger Checklist”, the St. Louis Council has reorganized the “Minimum Requirements” and divided them into two sections:

- **Group A** is composed of fundamental and readily attainable requirements that should be implemented, in Phase I, immediately upon election of the New President and appointment of officers.
- **Group B** is composed of requirements that may take time to implement and are addressed in Phases II and III. This prioritization is reflected in “Phased Merger Checklist” document.
Minimum Requirements for Conferences:

Review the following “Minimum Requirements” and develop a plan to improve areas in which the Conference is not meeting the requirements of the Rule.

Minimum Requirements - **Group A** (in place immediately upon election of the new President)

1. The Conference meets regularly and frequently, and not less often than twice a month. Weekly meetings are desirable. (Rule, Part I, 3.3.1, Part III, Statute 5)

2. The Conference has four or more active members and a full slate of officers: President, Vice President, Secretary, and Treasurer. (Rule, Part III, Statute 12)

3. Prayer, spiritual readings, and reflection are central to each meeting. (Rule, Part III, Statute 7)

4. The Conference has an active, trained Spiritual Advisor who attends full meetings regularly and accepts responsibility to promote the spiritual life of the Conference. (Rule, Part I, 3.13, Part III, Statute 15, U.S. Manual, Pages 48-49)

5. The Conference has person-to-person contacts with Neighbors. (Rule, Part I, 1.2, Identity Statement)

6. Home visits are the “central and most basic activity” of the Conference. (U.S. Manual, Page 23)

7. All Home Visits and other interviews are made by two Vincentians. (Rule, Part III, Statute 8)

8. The Conference maintains a positive relationship with the clergy. (Rule, Part I, 5.1)

9. The Conference maintains regular communication with its Pastor and parishioners on its service and activities, including an annual report, preferably through the parish bulletin. (Rule, Part III, Statutes 22 and 23, U.S. Manual, Page 30)

10. The Conference excludes no one from membership based on age, sex, race, or ethnic background. (Rule, Part I, 3.2)

11. The Conference serves all those in need regardless of age, sex, race, ethnic background, or lifestyle. (Rule, Part I, 1.4 Part III, Statute 8)

12. All donations go to the works of the Society to maintain Society structure, both nationally and internationally. No donations are used to fund other charities no matter how worthy. (Rule Part I, 3.14, Part III, Statute 26)

13. The Conference maintains a bank account separate from the parish, under the control of the Conference Treasurer. (Rule, Part III, Statutes 12 and 24, U.S. Manual, Pages 26 and 30)
Minimum Requirements - **Group B** (In place within 12 months)


15. The Conference submits quarterly Conference Activity Reports (CARs) to the Council Office. (Rule, Part III, Statutes 22 and 23)

16. The Conference upholds the spirit of non-accumulation of wealth. (Rule, Part I, 3.14 and Bylaws Document 1, Article 16)

17. The Conference sends its members to formation and training sessions offered by the Society, particularly the Ozanam Orientation and Home Visit 101. (Rule, Part I, 3.6, 3.12, Part III, Statute 10)

18. The Conference attends District meetings and takes part in programs and events sponsored by their District/Diocesan Councils. (Rule, Part I 3.6, U.S. Manual, Page 36)


20. The Conference provides required support (solidarity dues) for Councils/Region. (Rule Part III, Statute 25)

21. The Conference conducts an annual audit or financial review, whichever is appropriate. (Rule, Part III, Statute 23 and Bylaws Document 1, Articles 12 and 16)

22. The Conference President has served no more than two consecutive 3-year terms. (Rule, Part III, Statute 12)

23. The Conference adopts Bylaws within one year of its start and updates bylaws whenever new standard bylaws have been approved by the National Council.

24. The Conference is aggregated or has filed an application if it has been in existence for one year or more. (Rule, Part I, 3.8, Part III, Statute 6)
Questions About Required Practices

1. How does the Conference encourage knowledge of the Rule and adherence to it?

2. How does the Conference encourage the Spiritual Growth of the members?

3. What percentage of Conference members have attended Ozanam Orientation in the last 3 years? What is the plan for those who have not attended?

4. What formation and training have Conference Officers and the Spiritual Advisor attended?

5. Has the Conference adopted a set of standard Bylaws that conform to those most recently approved by the National Council (April 2019)? Attach a copy of your current bylaws.

6. 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?

Questions About Standard Operating Procedures and Practices

1. Does the Conference protect those we serve as vulnerable citizens with safeguarding policies and practices at a minimum in alignment with Council, Diocesan, and Parish requirements for volunteers?

2. 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?

3. How does the Conference encourage attendance at District/Diocesan Council Meetings/Training/Social Events?

4. Has the Conference established its own internal guidelines for helping Neighbors? What are they?

5. Is the Conference twinning? How and where?

6. How does the Conference raise funds?

7. What is the Conference plan for obtaining new members? How many new members have been added in the past year?

8. How does the Conference communicate with parishioners/community?

9. What special programs does the Conference have to help Neighbors in Need?

10. Should the Conference make use of District/Diocesan Council Programs to assist people?
Questions About Recommended Best Practices

1. How does the Conference make use of the “Serving in Hope” formation series?

2. How many members have attended a Regional/National Meeting? Does the Conference provide funds to cover the cost of member attendance, or take advantage of Council or National scholarships?

3. How many members serve as Officers or Committee Members for the District/Diocesan Council?

4. Does the Conference have a file/list of local resources for the members to share with Neighbors?

5. Does the Conference regularly meet with community agencies to learn about their services and seek opportunities for collaboration?

6. What does the Conference do to go beyond meeting immediate needs (such as rent, utilities, food, clothing) and help individuals move out of poverty? (check all that apply):
   a. Special works or Systemic Change programs of our Council
   b. Referring Neighbors to community programs that build skills
   c. Follow-up home visits / mentoring to deepen relationships with Neighbors (describe briefly):
   d. Advocating for change in local, state, or federal policies (cite examples)

7. Does the Conference enlist the aid of local businesses?