



The Society of St. Vincent de Paul
of Contra Costa County

Guidelines for Conferences

Banking Practices

What the Conference should look for in selecting a bank:

- Use a banking facility that will return cancelled checks or electronic images with every monthly bank statement.
- Use a banking facility that does not charge a monthly fee. If you have a long relationship with a bank, negotiate this matter or switch banks.
- Never use a member personal account or a parish account.
- Use the SVDP Contra Costa County Conferences federal identification number. Currently we are all using 94-1448577 it is going to change soon.

Financial Practices

- Always remember that funds raised to support your Conference must be devoted exclusively to the charitable purpose and programs of the Society.
- Adopt a guideline for signatures required on Conference checks.

Every Conference is different so you should set your own dollar limits.

Some suggestions are:

- All checks written for over say \$200 require two signatures.
- All checks written for over \$400 must be approved by the Conference
- President and treasurer or you could set up an approval committee. Your Conference may require a membership vote on checks over \$500.
- Set periods of time between each category of payment requested.
 - Help with Rent – once every 6 months
 - PG&E – Every two months
 - Telephone – It is important that a home have telephone service in case of an emergency. If the service includes television, that portion is not a necessary expenditure. Only pay the delinquent portion of the bill.

- What ever your check signing policy is it should be shown on the signature card at the bank.
- Make sure your bank signature card is up to date at all times.

Treasurer should check the bank activity at least every week to make sure there are no unauthorized disbursements. Unauthorized transaction happen so by checking you can catch it early. Report it to the bank so they can stop payment or take other appropriate action. Most banks provide an on-line site so you can look at your account as often as you desire.

Treasurer should reconcile the Conference checkbook each month as soon as they receive the monthly bank statement. Most bank statements provide a section for the reconciliation. All outstanding checks should be listed on every bank reconciliation form. Any special transactions should be highlighted so that you call attention and have a record going forward during the year.

If a Conference purchases gift cards for distribution to their clients a separate record must be maintained. You must remember that the cards are the same as CASH. All of the cards should be listed in numerical order with the value shown beside it. As the cards are distributed, the clients name, date issued, purpose (food, gasoline, etc.) and the members name or names that issued the card. A suggest form is attached.

Monthly Meetings.

- Establish a set day and time for monthly business and spiritual meetings.
- President should present an agenda detailing the topics to be discussed.
- Secretary should present the minutes from the previous meeting for discussion and approval by the membership.
- Treasurer should provide a financial report. Based on the report, the membership can propose spending policies based on the financial condition of the Conference. Many Conferences have high and low periods in their bank balances and it could prompts discussion on fund raising activities.

Conference Audit Procedure

- Financial records should be audited at least once a year or at the change of the Conference President. Two members should be delegated by the Conference, by a qualified professional person or organization, or by delegated persons from an upper council.

Donations

- If a Conference receives a donation over \$250, send a letter of receipt so they can file it with their tax returns. Funds donated through the Parish do not have to be individually recognized because the Parish should send out a letter that includes all of donations received at the end of the year.

Automobile Donations

- If your Conference is going to accept vehicles as donations, you should use the National Vehicle Donations Program. It is recommended that you contact the Contra Costa County District Council for guidance.

Twinning

- All transfer of funds from one Vincentian jurisdiction to another as part of the International Twinning Program is accepted and endorsed. In order to provide the necessary information base and accountability, all such arrangements should be arranged through the respective National Councils of the linked Conferences. National Council said "all appeals for financial help made to the Society of St. Vincent de Paul across Diocesan lines must first be submitted to the National President of the Society for investigation, and, if approved, bear such sanction in writing or else be judged to be unauthorized."

If a Conference is proposing a twin, most Pastors want to be aware of the request since funds are coming out of the Parish Conference. That should be your first approval step.

Conference Treasurer's Handbook and Journal

- The handbook and journal is a very valuable resource for the Conference President and Treasurer. The material covered will make the task easier for the Treasurer.
- President should be aware of the information contained in this manual so he can review the procedures his Treasurer is using.
- When possible, the President and Treasurer should review each section so they are operating according to the Rule, The Manual and nationally approved By-laws.

- The definitions for all of the income and expense classifications are contained in this publication. It is a big help when preparing the quarterly and annual reports required by the District Council.

SVDP web site (svdpusa) has numerous sites to help add to your guidelines manual. They include both operational and spiritual information. Add to the guidelines as situations present themselves. Your guidelines will grow from the Conferences daily experiences. No individual member has a right to override what the Conference decide

The following pages are devoted to maintaining your Conference financial record.
Suggestions for maintaining Conference financial records

We encourage you to use Cash accounting.

What is cash accounting?

The reporting of the information shown on your bank statements.

- Only the checks and cash payments received and deposited.
- Only checks and cash payments made.
- Do not include donation commitments that are not actual checks or cash received and deposited in the bank.
- Do not include bills that have not been paid. Only the ones shown on your bank statement.
- Monthly Bank reconciliations are so important because it keeps you on top of your income and expenses. It helps to find errors early and you are aware of outstanding checks that should be voided because they are lost or misplaced by a client. You also pick up bank errors within days after receiving the statement and can submit them for correction.
- Cash accounting is easy to follow for your Conference, your Parish Finance Committee, your Conference Audit Committee and our outside auditors.

Quarterly and annual reporting:

What are we asking you to report on your quarterly and annual reports?

- Beginning balance that you report should be the same number as the beginning balance on the first months bank statement. September 30th since our reporting period is October 1 through September 30 each year. If you accrued an outstanding check on your annual report then it will be the balance shown on your prior year annual report (September 30th) when starting your new year.
- Ending balance should be the same number as the ending balance on your last bank statement. It can also reflect any accrued items.
Quarterly – December 31st, March 31st, June 30th and the Annual report - September 30th.
- Total income should reflect the aggregate of all of your deposits (credits) as shown on your bank statements. (Quarterly report would be the three monthly statements added together.)
- Total expenses should reflect all aggregate withdrawals (debits) as shown on your bank statements. (Conference Annual report would be the three Quarterly reports and the last quarter added together.)
- We ask that you submit reconciled bank statements with each report. Please make sure that the copies are clear and dark enough so they can be read and copied. If you decide to include outstanding checks in your expenses, please make sure that the information shown on your final Quarterly or Annual bank statement contains the check numbers and the check amount. This is a deviation from cash accounting and we do not recommend that you use them.
- If you have an item included in your income and expense that is not shown on your bank statements, please provide a detailed explanation.

Other helpful items and reminders:

- **Review the Conference Treasurer's Handbook and Journal.**

Every Conference President and Treasurer should review the information contained in this booklet. A section is devoted to describing the income and expense items and where they should be entered on your quarterly and annual report. This booklet contains a number of items that will help a Treasurer in doing his or her job.

- **Voided checks.**

If you have a voided check do not count it as either a deposit or expense. You have to add it back to your running bank balance so your available cash is

corrected. You do have to reduce the expense item originally charged. If it is an item from a prior year, do not go back and change the ending balance. Just reduce the expense item this year. If you issue another replacement check then it will have a zero effect on the current years financial statement.

- **Monthly bank fees.**

Some conferences are paying monthly bank fees. There are banks that do not charge fees, particularly for non-profits. Consider having a discussion with your local bank to see if they can waive the fee or even if they do anything to support local charities.

- **Bank Statements.**

Made sure your bank statement cut off is the end of the month. If it is not, ask the bank to change it. It is so much easier to maintain your records with this simple change. Use a bank that returns canceled checks and deposit slips or electronic images of both to the Conference with each bank statement.

- **Check copies.**

Make copies of all of the checks you receive. The bank should include a copy of the deposit slips in the monthly statements, however, you need a copy of the items shown on each deposit slip as support.

- **Savings Accounts.**

If you have a saving account and withdraw funds from the account, do it by check instead of cash. Petty cash or cash withdrawals are not recommended.

- **Consider using a computerized work sheet.**

If a Treasurer is skilled at using Excel contained in the Microsoft Office software package, I can forward a worksheet to them to download and use immediately. See Attached example. It contains the bank continuous transaction log. Each transaction can then be posted to an income and expense worksheet. It can be set up so you can transfer the column totals to your quarterly and annual reports. If

you are interested, call Bill Hurley at 925-837-7798 with an email address and I will forward it to you.

- **Bank Reconciliations.**

Compare the Conference bank balance to the bank statement balance and resolve any differences. Steps to reconcile a bank statement.

1. Review the bank statement and identify any checks or withdrawals (outstanding) that have been written/sent, but have not appeared on the bank statement.
2. Review the bank statement and identify any deposits (outstanding) that have been written/received that do not appear on the bank statement.
3. Start with the Conference Treasurer's balance and add the "outstanding" checks and subtract the "outstanding" deposits. The number should match the bank balance.
4. If the number is not the same, go back and check your entries and your math. The bank sometimes makes errors in posting a deposit or a withdrawal.

Sample Support Form to be used when you cannot get a copy of the invoice.

Date _____
Check number _____
Explanation _____ _____ _____
Prepared by: _____

EXAMPLE OF FINACIAL REPORTING FOR EACH CONFERENCE PAGE 1

Example of Bank recording for XYZ Conference

Bank of Down the Street							
Date	Description	Ck #	Income	Expense	Running Balance	Item Class	Bank Rec.
09/30/16	Beginning Balance				975.00		
10/01/16	5th Sunday Collection		2,800.00		3,775.00	2	
10/01/16	Member contribution		200.00		3,975.00	1	
10/03/16	Mary Boyd - PG&E	1211		129.18	3,845.82	6	
10/06/16	Ed Smith - Auto Repair	1212		150.00	3,695.82	6	
10/09/16	ABC Market - Food Pantry	1213		900.00	2,795.82	6	
10/20/16	St. Edward - Twinning	1214		100.00	2,695.82	8A	
10/22/16	Purchase Target Gift Cards- \$25Eac	1215		500.00	2,195.82	6	
10/25/16	Paid for Lois Eddy - Clothing Vouch	1216		28.00	2,167.82	6	11/05/16
11/01/16	Member Contribution		250.00		2,417.82	1	
11/06/16	Ed Sandusky - Reimburse - Poor Wa	1217		120.00	2,297.82	11C	
11/03/16	Mary Jones - PG&E	1218		184.55	2,113.27	6	
11/15/16	Proceeds Poor Walk		1,500.00		3,613.27	3C	
11/18/16	Grant - CCC Conference		500.00		4,113.27	5A	
11/25/16	Solidarity Contribution	1219		195.00	3,918.27	9	
11/25/16	Voided ck - Mary Jones - PG&E- LO	1218		(184.55)	4,102.82		
11/25/16	New Ck - Mary Jones - PG&E	1220		184.55	3,918.27		
11/30/16	Bank Interest		2.00		3,920.27	5E	12/06/16
12/05/16	ABC Market - Food Pantry	1221		852.00	3,068.27	6	
12/08/16	Ed Jones - PG&E	1222		98.24	2,970.03	6	
12/15/16	Christmas fund raiser supplies	1223		697.15	2,272.88	11A	
12/20/16	Christmas Fund raiser		2,550.00		4,822.88	3A	
12/23/16	Client Christmas Deliveries			412.00	4,410.88	6	
12/28/16	5th Sunday Collection		3,200.00		7,610.88	2	01/05/17
	1st Qt Total		11,002.00	4,366.12			

SOCIETY OF ST.VINCENT DE PAUL OF CONTRA COSTA COUNTY					PAGE 2
Treasurer's Quarterly Report					
Conference Name:		XYZ Parish			
President's Name:		Ed Workman			
Prepared by:		James Balance			
Date:		1/15/XX			
Last Quarter's Ending Balance				975	
Adjustment to Last Quarter's Ending Balance				0	
Adjusted Ending Balance					975
RECEIPTS:					
1	Donations from Members			450	
2	Church/Poor Box Collection			6000	
3A.	Fund Raising - Special Works			2550	
3C.	Fund Raising - Special Events-Other			1500	
4	Other SVDP Contributions				
5A.	Other - Grants			500	
5B.	Other- Distaster Funds				
5C.	Other- Capital Campaign Funds				
5D.	Other - Other Restricted Funds				
5E.	Other- Misc. Receipts			2	
Total Receipts (1 thru 5E)					11002
EXPENSES					
6	Those We Serve			3254	
7	Disaster Contributions				
8A.	Domestic Twinning			100	
8B.	International Twinning				
Subtotal (A) (6 thru 8)					3354
9	Solidarity Contributions (Dues/Tithing)			195	
10	Contributions to Upper Councils				
11A.	Operating Expense - Special Works			697	
11C.	Operating Expense - Special Events			120	
11D.	Operating Expense - Other				
12	Other				
Subtotal (B) (9 thru 12)					1012
Total Expenses (Subtotal A + Subtotal B)					4366
ENDING BALANCE: Beginning Balance + Total Receipts - Total Expenses					7611
* Note: Attach contact list for International Twinning partners					



2018

QUARTERLY CONFERENCE REPORT

Fiscal Year: 10/1/2017 - 9/30/2018

(ARCH)DIOCESAN COUNCIL: _____ District Council: _____

CONFERENCE NAME: _____

ADDRESS: _____
Street City State Zip Phone

REPORTING PERIOD FROM _____ TO _____ (QUARTERLY)
FREQUENCY OF MEETINGS (CHECK ONE): WEEKLY _____ EVERY OTHER WEEK _____ MONTHLY _____ OTHER _____

Our Conference has formally adopted and is in compliance with the most current version of "Document 1: Bylaws for Conferences," which can be found on www.svdpsusa.org. Yes _____ No _____

Treasurer's Report (includes Receipts and Expenses from Conference, Stores and Special Works)

Ending Balance - (Required)
 All Items - (Attach Items - Ending Balance - Attach an Explanation)
 Beginning Balance - (Attach - Required)

Receipts (Please round all figures to the nearest dollar)

1. Donations from Members	\$		
2. Church/Poor Box Collections	\$		
3A. Fund Raising - Special Works	\$		
3B. Fund Raising - Stores	\$		
3C. Fund Raising - Special Events/Other	\$		
4. Other SVdP Contributions	\$		
5A. Other - Qualified Government Grants Only	\$		
5B. Other - Disaster Funds	\$		
5C. Other - Capital Campaign Funds	\$		
5D. Other - Other Restricted Funds	\$		
5E. Other - Misc. Receipts	\$		
Total Receipts (1 thru 5E)			+ \$

Expenses (Please round all figures to the nearest dollar)

6. Those We Serve	\$		
7. Disaster Contributions	\$		
8A. Domestic Twinning	\$		
8B. International Twinning**	\$		
**Attach contact list for International Twinning Partners			
Subtotal (A) (6 thru 8B)		\$	
9. Solidarity Contributions (Dues/Tithing)	\$		
10. Contributions to Upper Councils	\$		
11A. Operating Expense - Special Works	\$		
11B. Operating Expense - Stores	\$		
11C. Operating Expense - Special Events	\$		
11D. Operating Expense - Other	\$		
12. Other	\$		
Subtotal (B) (9 thru 12)			
Total Expenses (Subtotal A + Subtotal B)			- \$

Ending Balance = Beginning Balance + Total Receipts - Total Expenses

Visits and Services to People

(ALL RESPONSES BELOW INCLUDE CONFERENCE, STORES AND SPECIAL WORKS)

	Column 1	Column 2
Person-to-Person Visits	# of Visits	# of People Helped (Includes In-Kind)
A. Home Visits		
B. Prison Visits		
C. Hospital Visits		
D. Eldercare Visits		
E. Other In-Person Visits		
Total Visits and Services to People (A thru E)		

"In Kind" Services and Goods

"In Kind" Services	# of Times	"In Kind" Value
F. Legal		
G. Medical		
H. Dental		
I. Other		
Total "In Kind" Services (F thru I)		
"In Kind" Goods	# of Times	"In Kind" Value
J. Food		
K. Furniture		
L. Clothing		
M. Other		
Total "In Kind" Goods (J thru M)		

Total "In Kind" Services and Goods (F thru M)		\$
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TOTAL HOURS OF SERVICE: MEMBERS	
TOTAL HOURS OF SERVICE: NON-MEMBERS	
ESTIMATED MILES IN VINCENTIAN SERVICES	

Signature of Conference President

() _____
Phone

Date

Signature of Conference Treasurer

() _____
Phone

Date

The National Council does not require quarterly report filings. Conferences should complete the quarterly report form and submit to their upper Council (if applicable) or retain this report record for consolidation into the annual report required by national.



INSTRUCTIONS FOR COMPLETING CONFERENCE QUARTERLY REPORT

The National Council does not require quarterly report filings. Quarterly reports are completed by Conferences either at the request of their respective upper Councils or to assist the Conference and promote more timely, accurate, and consistent reporting; they prove to be very helpful when completing the annual report and thus can be consolidated accordingly at the end of each fiscal year.

This Conference quarterly report form is ideal all Conferences. **Please do not use older versions of this form.** Remember that the key to good reporting is keeping good records throughout the reporting year [i.e., monthly and quarterly reporting]. Please read these instructions carefully. If you have any questions on reporting, contact your local Council for support.

This quarterly report is a reflection of the Conference, its Special Works and Stores whether they are separately incorporated or not.

Your cooperation is appreciated.

DEFINITIONS AND QUESTIONS:

(Arch)Diocesan Council Name: Enter the name of the (Arch)Diocesan Council in which this Conference exists. If no (Arch)Diocesan Council exists, enter the name of the Diocese.

District Council Name: Enter the name of the District Council of which this Conference is part. If this is an Isolated Conference, leave this blank.

Conference Name: Enter the Conference Name.

Address: Enter the address, city, state, zip code, and phone number of the Conference.

QUARTERLY REPORTING PERIOD: Always a 3-month period, based on fiscal year of the Society (Oct. 1 – Sept. 30).

OUR CONFERENCE HAS FORMALLY ADOPTED AND IS IN COMPLIANCE WITH THE MOST CURRENT VERSION OF "DOCUMENT 1: BYLAWS FOR CONFERENCES," WHICH CAN BE FOUND ON www.svdpusa.org. Every Conference is expected to have adopted a set of bylaws corresponding to one of the nationally approved sets of bylaws that are located on our main national website. Document 1 is the standard set of bylaws that is appropriate for 99% of all Conferences. The website documents have all of the wording that has been required by IRS and approved by various resolutions of the National Council. If your Conference has adopted this set of bylaws (Document 1) without changes, check off "Yes." If your Conference is using a different set of bylaws or if you are using Document 1 with modifications, check off "No." If you checked off "No," then your

bylaws are required to have been formally approved by an upper Council or the Regional Vice President.

TREASURER'S REPORT: This portion of the report includes the combined financial data from the Conference, its stores, and its special works. Please keep in mind that this is not a reconciliation of a single account. **This reflects all activity in all accounts.**

Balance Forward – when entering Balance information, include the balances of **ALL accounts** owned by the Conference: checking, savings, CDs, investment accounts, reserve accounts, store accounts, special works accounts, etc.

1. Last Quarter's Ending Balance: This is the Ending Balance as it appeared on last quarter's Conference Quarterly Report.
2. Adjustments to Last Quarter's Ending Balance: It sometimes happens that, after a report is submitted, an error shows up that needs to be corrected, affecting the ending balance. Enter any adjustments here that would correct last quarter's ending balance. Please attach an explanation.
3. Beginning Balance: Apply the adjustments to last quarter's ending balance and show the true beginning balance for this quarter.

TREASURER'S REPORT: Receipts

1. Donations from Members: Financial contributions in a given quarter from Active, Associate and Contributing Vincentian Members, including the secret collection taken up at Conference Meetings. It is not necessary to try to isolate and count checks from Members that come through Church collections.
2. Church/Poor Box Collections: Includes financial support in a given quarter from Church collections, Poor Box Collections, alms from distribution of religious papers at the Church door, allocations from parish funds, and other Church-related offerings.
- 3A. Fund Raising - Special Works: Enter the total gross income in a given quarter from all Special Works operated by the Conference.
- 3B. Fund Raising - Stores: Enter the total gross income in a given quarter from all thrift stores operated by the Conference. On the Stores Report, this item is titled "Total Revenue."
- 3C. Fund Raising – Special Events/Other: This includes donations in a given quarter not made in Church and financial support from activities not directly or exclusively Church-centered, such as suppers, and memorial donations. Fund Raising activities generally include all activities in which financial support is actively solicited (this includes Friends of the Poor Walk donations).
4. Other SVdP Contributions: Includes financial support received by your Conference in a given quarter from any other Vincentian Councils, Conferences, and stores or special works not owned by your Conference. Friends of the Poor Grants are to be included here. Do not

include funds that are transferred to the Conference from the stores and special works that the Conference owns and operates.

- 5A. Other – Qualified Government Grants Only: This includes ONLY grants received in a given quarter from federal, state, and local government agencies that individually exceed \$50,000 with documentation that the grant provides an administrative allowance of ten percent or less. All other grants are to be included in 5D below (Other – Other Restricted Funds).
- 5B. Other – Disaster Funds: This includes all money received in a given quarter for local disasters for which a special non-operating fund has been established. For example, if your Conference area suffered from a tornado, hurricane or other disaster for which a special non-operating fund has been established, it can be included here.
- 5C. Other – Capital Campaign Funds: This includes all money received quarterly for a formally defined, non-operating capital campaign fund for your Conference. For example, if your Conference has established a capital campaign to raise funds to build a new pantry/office or make major renovations to an existing one, then the funds collected are restricted for that use and can be included here.
- 5D. Other – Other Restricted Funds: This includes all quarterly funds received for special projects for which a fundraising campaign was designated. For example, if your Conference has a special campaign to raise funds for a Back-To-School Program, then the funds collected are restricted for that use. This DOES NOT include “memo” designations on checks or special Conference-designated funds. For example, if someone writes “for food” on their check in the memo area, these would not be considered restricted funds. Also, Conference-designations such as part of a budget do not restrict funds. This category also includes all grants that are not qualified and included in 5A above.
- 5E. Other – Miscellaneous Receipts: All other sources of income (e.g., interest, bank adjustments, legacies, etc.).

TREASURER’S REPORT: Expenses

6. Those We Served: All quarterly funds expended for goods and services provided to those we served, including cash, checks, certificates, bus tickets, and gift cards. The principal method for payment of aid will be check, paid directly to the provider of those goods or services. This also includes the cost of food purchased to stock your food pantry. For those Conferences that operate stores and other Special Works, this includes dollars spent for direct aid to those in need.
7. Disaster Contributions: Include all monies expended quarterly for disaster relief locally, nationally, and internationally, if applicable.
8. A. Domestic Twinning: Quarterly funds sent to another domestic (within the United States) Conference or Council (over and above the solidarity contribution) if applicable.
- B. International Twinning: Quarterly funds sent to a Conference or Council outside of the United States, if applicable.

9. Solidarity Contribution: The quarterly solidarity contribution to upper Councils, if applicable.
10. Contributions to Upper Councils: Funds sent to an upper Council (over and above disaster, Twinning, and solidarity contributions).
- 11A. Operating Expense – Special Works: This includes all funds expended to operate Special Works. This DOES NOT include dollars spent as direct aid to those in need from those special works. Direct aid to those in need is not an operational expense.
- 11B. Operating Expense - Stores: This includes all funds expended to operate Stores. This DOES NOT include dollars spent as direct aid to those in need from those stores. Direct aid to those in need is not an operational expense. On the Stores Report, this item is titled "Total Expenses (Wages, Benefits, Operating)."
- 11C. Operating Expense – Special Events: This includes all funds expended for fund raising events such as dinners, Friends of the Poor Walk, memorial donations, etc.
- 11D. Operating Expense - Other: Include Conference operational expenses such as postage, stationery, printing, phone, travel, and similar expenses, as well as any rent or utilities paid by the Conference for use of facilities.
12. Other: All other expenditures not covered by another category. (Please attach an explanation.)

REMEMBER:

	BEGINNING BALANCE
+	TOTAL RECEIPTS
-	TOTAL EXPENSES
=	ENDING BALANCE

VISITS AND SERVICES TO PEOPLE: This portion of the report includes the combined statistical data from the Conference, its stores, and its special works.

PERSON-TO-PERSON VISITS

The "number of people helped" during the visits must include the number of people helped with In-Kind goods and Services. "In Kind" refers to non-cash contributions: anything (food, furniture, clothing, services, other) that the Conferences receive at no cost and pass on directly to a family or individual or use internally by and for the Conference. In-Kind Food should reflect only what was donated – not what was purchased.

Help is only given through some type of visit. For example, if you give food to a family or give them a voucher for food, it happens while visiting with the family either in their home or at another location.

- A. Home Visits: Visits to a person's home; sometimes more than one home visit is required. If you visit a family of four, three times, you should count 12 people helped (4 people x 3 visits).
- B. Prison Visits: Person-to-person visits to prisoners. If you visit three persons once a month for a quarter you should report 9 people helped (3 prisoners helped x 3 visits).

- C. Hospital Visits: Patients visited at a hospital. (Two members visiting the same patient counts as one visit.)
- D. Eldercare Visits: Occur each time a visit is made to a nursing home, rest home, convalescent hospital, or a facility for the aged (e.g., retirement, assisted living). (Two members visiting the same patient counts as one visit.)
- E. Other In-Person Visits: Any other person-to-person contact at any location other than their home.

Total Visits and Services to People: If you provide a family multiple help (e.g., "in kind" goods, a home visit), show it as 1 home visit, 4 people helped (parents with two children). Number of people helped is 4 (show under "Home Visit").

Total Visits: Total of (A) through (E). Show both total number of visits and total people helped.

Total People Helped: Total visits (A through E) to get the total number of people helped.

"In Kind" Services and Goods: (F through M)

"In Kind" refers to non-cash contributions: anything (food, furniture, clothing, services, other) that the Conferences receive at no cost and pass on directly to a family or individual or use internally by and for the Conference. In-Kind should reflect only what was donated – not what was purchased. Enter the number of times the service or goods was offered and the value of those services or goods.

Total Hours of Service: Members: All member hours spent in *any* activity relative to the Society of St. Vincent de Paul, including all hours helping people, attending meetings, travel time, workshops, SVdP spiritual gatherings, etc. Include member hours of service at the Conference owned stores or special works. Do NOT include member hours worked at a store or special work NOT OWNED by the Conference.

Total Hours of Service: Non-Members: This includes hours of service at the Conference owned stores or special works that are work by non-Vincentians, community service hours, court ordered hours, etc.

Estimated Miles in Vincentian Service: Estimated miles driven by members to assist those we serve and related meetings.