

# **Society of Saint Vincent de Paul**

## **Greater Toronto Central Council**



### **Guide for Conference Presidents and Executive Members**

#### **What you will find in this Booklet**

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# Introduction

Thank you for considering this role and supporting the core work of the Society of Saint Vincent de Paul, Home Visitation, person to person service to our Neighbours in Need. Your Conference belongs to a Particular Council, and is part of the Greater Toronto Central Council (GTCC). You report to, and receive support from the Greater Toronto Central Council, as well as the staff of the Central Council Office.

## Welcome, New President

If you're feeling a little overwhelmed at the moment, it's probably because you're thinking about the range of tasks and responsibilities that have been placed gently in your lap. These include:

1. Practical concerns
  - How to plan and run an appropriate, effective, interesting, enjoyable meeting;
  - Ensuring banking information is current and has adequate signing officers;
  - Understanding Greater Toronto Central Council policies;
  - How to organize visitation schedules, file keeping, etc.;
  - Reporting to the Particular Council or the GTCC, as required.
  
2. Leadership issues
  - How to keep your Conference spiritual, active, focused, energized, and joyful;
  - How to ensure your Conference is appropriately and adequately serving the needs of those seeking assistance; appropriately here means the proper allocation of scarce resources, namely donations of which we are to be good stewards.
  - How to help your members grow in their faith and ability to serve our Neighbours in Need;
  - How to retain current members and recruit new members;
  - How to delegate appropriately tasks and responsibilities to other Conference members, encouraging all to consider taking on leadership roles.
  - Ensure that your Conference is “sharing” properly by not hoarding and building in automatic pass-ups when your funds exceed a reasonable 3 to six month average reserve.

Hopefully, by the end of this booklet, you'll know that with the support and assistance of your fellow Conference members, and with the guidance of your Particular Council, the Central Council Office and the GTCC Board, you will be an effective leader of your Conference.

# The Rule

The Rule is an amalgamation of the knowledge, wisdom and inspiration gained through more than 175 years of service to Neighbours in Need. It is a source of inspiration, guidance, and information for Vincentians. It guides us in our vocation.

Every member should have a copy of the Rule, available through the Central Council Office, or online ([The Rule](#)). Please ensure your members have the updated edition.

## Five Guiding Principles:

These principles guide us as Vincentians in our Vocation and Outreach. Please discuss these principles in relation to your Conference outreach.

### **Guiding Principle 1 – Home Visits**

Home Visits are important – Visiting Neighbours in Need in their homes is the primary and preferred form of meaningful, person-to-person service by Vincentians in each Conference.

### **Guiding Principle 2 – Equity of Service**

Neighbours in Need in similar circumstances and with similar needs receive similar levels of service across the GTA.

### **Guiding Principle 3 – Continuous Learning**

Because we strive to serve our Neighbours in Need by helping them meet some of their immediate needs, as well as assisting them in their efforts to move forward, Vincentians strive to grow in the knowledge and skills required to achieve these goals.

### **Guiding Principle 4 – Renewal**

In order to serve Neighbours in Need appropriately and effectively, the Conference needs to be spiritual, active, committed and creative. Such a Conference is difficult to maintain without a sufficient number of active members and without the addition of new members.

### **Guiding Principle 5 – Sharing**

As a fundamental principle of the Society of Saint Vincent de Paul is that funds are moved within the Society to where they are most needed, Conferences send excess funds up, generally keeping a balance in their account of no more than three months reserve (i.e. the average amount they would spend in three months).

# What Do You Do First When You Become President?

## Summary of Duties when you first become President:

- Read through this booklet, and always, *always* reach out to the Central Council office or fellow Vincentians for support.
- Inform the GTCC office that you are the new President, and identify your Executive as they become known (info@ssvptoronto.ca);
- Introduce yourself to your parish priest and office staff as the new President;
- Work with your Conference to choose a new executive. The President appoints the positions of Treasurer, Secretary and Vice President(s);
- Ensure you are registered on the Conference bank account with a minimum of two other members;
- Receive files, records and important documentation from the past executive, and ensure all is kept securely;
- Check out the Society's website ([www.ssvptoronto.ca](http://www.ssvptoronto.ca)). All the material you need to support you in your role is there;
- Attend your Particular Council meetings. They are your source of support and information;
- Review the polices listed at the end of this document, and be sure your Conference members are aware of their responsibilities with regard to these policies including, where appropriate, the distribution of written copies of the policy;

# What Type of Leader Will You Be?

## a) Ready to seek information and assistance from:

- The past President (and other current or former executive members);
- The Conference as a whole, and experienced Conference members;
- The Particular Council President and Executive members;
- Neighbouring Conference Presidents;
- Greater Toronto Central Council Staff and Board;
- Spiritual advisors.

## b) Willing and able to delegate?

Appropriate and regular delegating of tasks and responsibilities accomplishes a few important objectives.

- It helps ensure a number of important tasks will be completed in an appropriate and timely manner;
- It means as President, you will not be overworked and overwhelmed;
- Perhaps most importantly though, it means the members are making important contributions to the well-being and effectiveness of the Conference and are developing the skills and confidence to take on leadership roles in the future.

By keeping all the work to yourself (for whatever reason, such as an unwillingness to bother other people, or because you feel only you can do it properly), you are doing a disservice to those being served, to individual members, to the Conference and Society, and to yourself.

## c) Providing opportunities for members to grow in faith and ability to serve?

This commitment involves:

- Ensuring every meeting includes prayer and a meaningful spiritual reflection (suggested readings are sent monthly to the Conferences);
- Ensuring meetings provide opportunity for members to increase their knowledge and understanding related to their service;
- Encouraging members to seek out and take advantage of growth opportunities;
- Recruiting new members on a regular basis;
- Seeking out a Spiritual Advisor (pastor or other appropriate person);
- Setting meeting agendas to ensure your members will pray, reflect, share, learn, socialize and contribute during Conference meetings;
- Attending scheduled Particular Council meetings, and encouraging Conference members to also attend.

# Your Conference Executive

Keep in mind:

1. There is a lot that should and can be done within a Conference. If the tasks and responsibilities are spread among the executive and the rest of the Conference members, the workload will be equally distributed, and things will be done more efficiently and effectively.
2. The executive members will have the opportunity to develop their leadership and organizational skills, as well as their confidence. This greatly increases the likelihood that at least one member will acquire the experience and leadership skills necessary to take over the presidency at the end of your three-year term.

Members are often reluctant to take on leadership roles. There may be various reasons for this:

- They feel other commitments (work, family) wouldn't allow them to do the job properly.  
Suggestion: Have two vice-Presidents or divide the tasks of the secretary or treasurer between two members;
- They don't feel they have the experience or skills needed.  
Suggestion: Assure them that you or others will mentor them;
- They indicate that they joined the Society to serve, not to lead.  
Suggestion: Remind them that taking on a leadership role is a special way of serving our Neighbours in Need. Through their leadership or other responsible roles, executive members are helping make the Conference more spiritual, active, vibrant and focused, resulting in more effective service to Neighbours in Need.

Get a commitment to the role on a temporary or interim basis, with the assurance they can step down if they find it too challenging;

If they've been given other Conference tasks or responsibilities previously, they are more likely to gain the confidence to take on this new responsibility.

For a full understanding of the roles and responsibilities of a **Conference Executive**, [click here](#). Having trouble assembling an Executive? Allow persons to share the role, seek out volunteers for one particular function. Ask for help.

# Planning Effective Meetings

Problems can occur if you haven't had much experience planning effective meetings:

- Tendency to keep too tight a grip on the meeting and discussion, perhaps because you fear losing control or appearing incapable;
- Getting into a rut, where each meeting is the same as the previous one, following a standard agenda allowing little room for genuine learning, sharing, problem solving, or laughter.
- Don't hesitate to have others with this skill get involved.

We have developed a booklet entitled [Effective Meetings](#), to assist you.

Following is a sample agenda to help keep things on track:

- *Opening prayer*
- *Spiritual reading*
- *Adoption of the agenda and minutes of previous meeting*
- *Financial report*
- *Information from Particular or Central Council*
- *Sharing information on service to Neighbours in Need...respectfully seeking out the best ways of helping*
- *Conference Initiatives:*
  - a) *Social Justice*
  - b) *Other ...*
- *New Business*
- *Secret collection*
- *Next Meeting date and time*
- *Closing prayer*

Where do you get a copy of the Rule, Prayer Cards, Vouchers, Collection Envelopes? They are all available from your Central Council Office.-(416-364-5577 ext. 0)

# Conference Activities: Home Visitation

For Conferences with many calls for assistance, home visitations will become the primary activity of that Conference. Anything done over and over again, however, can become routine, even mechanical. We can even begin to forget what really matters in the task. In our zeal to provide assistance and fulfill our mission calling, it's easy to forget, as well, that we are not a Government agency; we rely on donors who expect us to be good stewards of their gifts to us and it is incumbent on us to recognize the fact that not everyone who calls on us for help is truly in need or is the person in most need of our scarce resources at that time. We must exercise good judgment and often that means asking hard questions such as "What's changed?" All of us, including our neighbours in need, must learn to live on a budget of some kind. Our purse is not bottomless and that means prioritizing. Just because a person calls us every four weeks doesn't mean that we can or should be handing out vouchers based solely on the call. Too often human nature injects itself and that means people buy what they want and beg what they need.

Home visits are about meaningful, person-to-person contact with those in need. The voucher is one way we assist, but it is not the most important way. **The love, respect, caring, patience, understanding and hope we bring is more important.** This is true even for the Neighbour in Need who wants just the voucher and closes the door.

**Home visitation is the core of what Vincentians do.** It is one of the activities making the Society and our works unique and effective. Although there may be some valid reasons and circumstances for some Conferences to reduce the number of home visits and to opt for other ways to assist (food pantries, meeting Neighbours in Need at the church), we hope you, as President, will do everything possible to keep home visitations the core work of your Conference. In many cases, the solution is to recruit new members who can ease the strain home visits sometimes impose on longer serving members.

A few Conferences have committed members ready to serve, but receive few calls for assistance. In such cases, the Conference may wish to look more diligently for Neighbours in Need. Finding those who suffer from some form of poverty is not an easy task. In making the following suggestions, it is important to note that the more the Society is known, the more those in need will contact us for help.

- a. Referrals made by the clergy, government officials, police, hospitals, doctors, school personnel, etc. These persons should be made aware of our existence, our projects, and how to contact us;
- b. Referrals by other community organizations (food banks, other churches in the area, etc.). Such organizations should be familiar with our services and projects so we can help whenever they cannot;
- c. Observations by members. Encourage members to be alert for possible cases within their community, their schools, the church, etc.

## **Conference Activities: Other ways of serving**

### **“No work of charity is foreign to the Society”**

- Conferences are encouraged to serve Neighbours in Need “beyond the voucher”, while recognizing that most Vincentians are not trained social workers, nor should we pretend to be;
- Discussing with your pastor (and, perhaps, the Parish Council) what gaps in service there may be in the parish;
- Visiting our Special Works, hospitals, correctional institutions, homes for seniors, other institutions in the community;
- Encouraging Conference members to serve on committees, including:
  - a. Sponsoring another Conference through “Twinning.”
  - b. Joint projects with schools (food or coat program, etc.)
  - c. Becoming familiar with all community projects designed to help those in need without forgetting the projects of the Particular and Central Councils.
  - d. The members of your Conference or Particular Council have other great ideas.

## Conference Activities: Member Development

Anyone who serves another in any capacity has a responsibility to do the best they can, within the limitations of their time, gifts, knowledge and skills. The Rule makes it clear that members have a responsibility for continuous growth and development of their ability to serve.

Education and formation should focus on:

- a) The development of the Spirit of the Society among members.
- b) Improving our knowledge of available resources/support services and the comfort and ability of members to serve those with a wide range of needs and challenges.

The best time to train members is during Conference meetings. The time allowed for the Spiritual Readings is the best time to meet goal 'a' stated above. Short discussions on various topics such as ways of visiting, different social services, other community services available, etc., and 'b', will help meet the goal.

Training sessions, videos, orientation sessions, Particular Council or Central Council meetings, also offer learning and growth opportunities for you and your members. Members should be encouraged to participate in these meetings and seminars. In our ever-changing world, the Society of Saint Vincent de Paul - in order to survive - must offer services that meet today's needs. You and your Conference members must remain informed and current to best serve those in need.

## Conference Activities: Recruitment of New Members

If your Conference has not recruited and retained any new members in the last five years, it probably requires some renewal activity. You need to recruit new members:

- To ensure there are a sufficient number of **active** members to adequately serve those requesting assistance without overburdening existing members;
- To bring new energy, commitment, and ideas into the Conference;
- To ensure the long-term health and vitality of the Conference;
- To avoid issues related to the same few members becoming too entrenched and locked into certain ways of thinking and of doing things.

While personal invitation is generally the most appropriate and effective means of attracting new members, recruitment drives can also be effective. To assist in this regard, we have developed the [Recruitment Booklet](#) . Let your Particular Council President know you are considering a recruitment drive, and they will help you get the assistance you need.

**Attracting** new members is generally the easy part. **Keeping** new members can be more challenging. Your odds improve if you:

- a. Make it clear up front what this vocation involves. This ministry is not for everyone. Downplaying the level of commitment during recruitment drives could lead to disillusionment, as would be members experience the more difficult aspects of service to Neighbours in Need. Having an experienced member taking the prospective member on a few home visits before they commit to membership is a key step.
- b. Provide them with some training up front and provide ongoing support (mentorship). The Greater Toronto Central Council can assist with the training aspect.
  - People join so they can serve. You are more likely to lose members through boredom than due to overwork. If they are not getting the opportunity to serve on a regular basis, they will seek out other service opportunities.

Some Conferences have a few members who have served there for many years. They may feel they know how things should be done (“that’s the way we’ve always done them”) and might not appreciate new members coming in with new ideas and ways of doing things. If the new members believe their views are not given due consideration, they are likely to move on.

We need to be open to new ways of thinking. We need to be welcoming. We need to be respectful. We need to be humble.

## Your Conference – its connections to the Parish, the Community, and the Society.

The Conference cannot and should not exist or act in isolation from the parish, the pastor, the other parish ministries or other Conferences and Vincentians.

Please consider the following points.

1. We operate in the parish only because the **pastor** has authorized us to be an active part of the community. If the pastor decides the Conference is not effective or relevant or that it creates more problems than it solves, or if the pastor has a serious disagreement with the Conference, he might close it down (that is, by not providing meeting space and removing the poor box). This has happened in a few GTCC parishes. The pastor is responsible for what goes on in the parish and has a right to be informed (e.g. amount collected in the Poor Box, names of members, etc.). As an honorary Conference member, he also has a right to know who is being served. In order to continue to be effective and to thrive, a Conference (through the President) needs to maintain a good working relationship with the pastor.
2. The **parishioners** make your service possible. As donors, they have a right to have some idea of how the money is spent. More importantly, they need to feel good about the Society and its work. They need to feel the Conference is using their donations to help meet its Christian responsibility to care for “the least of our brethren.” As such, parishioners need to be updated by way of a financial reports (at least annually, offered verbally from the pulpit or as a bulletin insert). They need to know what the Society is and what we do. Most parishioners, when asked about the Society, will answer something like, “I know they help the poor somehow and I hear they’re a good organization.” Is that enough to encourage ongoing donations? Is that enough to encourage parishioners to consider becoming a **member** of your Conference? This is why it is important to remind parishioners of the work of the Society at least once a year.
3. Other **ministries** care about those in need as much as your Conference does. The members of these ministries have chosen a different way to serve, such as taking Communion to the sick, visiting the elderly, advocating for social justice etc. In many cases, ministries have little understanding of what each is doing. This could result in duplication of effort (and perhaps even competition) or worse, gaps in service among ministries and what the Society can offer. To offset this situation, some pastors (with the encouragement of the Archdiocese) are now

organizing all ministries – including the Conference - into groups or **Purpose Teams** (e.g. Service and Outreach, Sacraments and Worship, Servant Development, and Support and Infrastructure). If this type of sharing and cooperative effort has not been established in your parish, perhaps you can consider it.

4. As with ministries, there are a number of **organizations and agencies** in the community that care just as much as do you and your members. You are all trying, perhaps with somewhat different motivations and strategies, to serve Neighbours in Need. You and your members should know what other groups are serving your area (food banks, other faith groups, community programs) so you can help coordinate some efforts and reduce duplication, competition, and gaps in service. If other service organizations know your service exists and you know about theirs, you and the Conference can make referrals or create new services to fill gaps and undertake cooperative projects
5. The Society is structured so those providing the service (the Conference members and Special Works staff) receive all the support and assistance they need. The **Particular Councils and Greater Toronto Central Council** exist only to provide this support, assistance, and guidance. You and your Conference members can benefit in a number of ways:
  - 1 The opportunity to **share** successes and challenges at Particular Council meetings;
  - 2 **Moving funds** where they are most needed. For most Conferences, this means moving excess funds (more than about a 3-month reserve) up to the Particular Council. For some Particular Councils, it means requests for money to be moved down to the Conference;
  - 3 **Attending sessions** designed by the Particular Council or GTCC to provide information or sharing opportunities;
  - 4 **Maintaining close relations** with one or more neighbouring Conference Presidents and perhaps visiting other Conferences to see other ways of operating;
  - 5 **Attending Society events** to better understand your Society and the wide range of works undertaken by Greater Toronto Central Council;
  - 6 Using the **resources** available through GTCC office (416-364-5577) or the website ([www.ssvptoronto.ca](http://www.ssvptoronto.ca) , see Materials Available);
  - 7 Request **education assistance**, either one-on-one or through a speaker at your Conference or Particular Council.

## **Year at a Glance**

It is recommended each Conference establish a calendar for the year, where you can enter:

- Due dates for reports or other material to your Particular Council or to the Greater Toronto Central Council (Annual Treasurer and Secretary's reports, by end of February);
- Conference meeting dates;
- Particular Council meeting dates;
- Scheduled Conference events: Creating an annual budget, Bundle Weekends, verbal or written report to parishioners, Christmas collection, Christmas program, Marygrove Collection, Camp sign-ups etc.;
- Special events.

Setting up this calendar the first time requires time and effort but once developed, it is easily maintained each year. It will serve as a useful guide for a new President and as a regular reminder to all Conference members. The calendar could perhaps be printed on the back of each Conference meeting agenda.

## **Record Keeping**

### **Conference records – creation, retention, and disposal**

All documents belonging to the Society must be kept in good order, carefully labeled and stored in a secure place. GTCC is responsible for storing the membership applications and screening documents. Certificates of Aggregation and Institution should be held by the Conference or Particular Council, however a duplicate copy must be kept on file at the Central Council office. Neighbour in Need forms, reports, Conference membership lists, financial records, reports and minutes should be kept on file by the Conference following the timelines set out below.

When documents are past their recommended retention date, they must be shredded prior to disposal.

Members of the Society must take every precaution necessary to safeguard an individual's private and personal information. Failing to do so could lead to investigation and possible charges under Ontario's privacy legislation code of conduct.

# Retention and Archiving of Records

Conferences and Particular Councils are required to provide for ongoing maintenance and safekeeping of all records that provide historical data related to governing documents. While the Conference President is not responsible for directly creating and maintaining an effective system, they must ensure an effective system is in place.

<b>Documents</b>	<b>Timeframe/Responsibility</b>
Aggregation, Institution, Twinning forms	<b>GTCC - Perpetuity</b>
Membership Application forms - Conference must not keep Police Record Checks on file	<b>GTCC - Perpetuity</b>
Canada Revenue Agency: Charitable Registration forms, correspondence	Conference - Perpetuity
Minutes of meetings	Conference - 7 years
Financial Records and Annual Reports	Conference - 7 years
Lists of members and officers	<b>GTCC – 7 years</b>
General correspondence during the mandate of any President	3 years past the end of the term of that President
Neighbour in Need records	Conference - 3 years

## Neighbour in Need Records

A record of service to each Neighbour in Need is required. This helps ensure accountability, as good stewards of donated funds, but more importantly, it ensures effective and appropriate service to those in need. Be sure your system of record keeping meets the following objectives:

- Collects and maintains the information you need to provide appropriate service and accountability but does not invade privacy; see the [Privacy Policy](#)
- Is clear to all Conference members and is relatively easy to maintain;
- Provides for security and confidentiality of the information;
- Allows for creation of monthly and annual summaries of service;
- Allows for easy review (perhaps annually) of the service and support being provided to any Neighbour in Need.

# Looking Ahead

With the help of your Conference members, establish group and individual goals for those we serve. As part of this planning the Conference should be:

1. Always searching for the needs in your area as well as discussing these needs with your Conference and developing plans to meet these needs;
2. Inviting new people to join the Society on a regular basis so you will have enough members to accomplish the Conference work, bring new energy, commitment and viewpoints into the Conference, and provide other parishioners the opportunity to serve in this way;
3. Instilling in Conference members the true spirit of the Society, the love of Christ in the person of those in need;
4. Encouraging Conference members to take advantage of, and seek out opportunities to further their knowledge to provide better services;
5. Helping build a spirit of cooperation among the Conference and the rest of the Society, the Church and the community.
6. Building the leadership potential of members of your Conference so their skills and confidence continue to increase, and are well positioned to take on tasks and responsibilities today and leadership positions within the Conference and the Society tomorrow.
7. Reviewing the effectiveness and appropriateness of your service to your Neighbours in Need, particularly those receiving regular service for one or more years. **A booklet (Serving Longer-Term Neighbours in Need), available on the website** has been developed to assist your Conference in making important but difficult decisions in this area.

## **In Closing**

Although we as a Society strive to remain true to the mission, vision and values of our founders and patron saint, we continue to adapt to changes and realities facing our Neighbours in Need. We continue to grow, as an organization and as individual members in our ability to serve. With love, compassion, respect, joy and humility, we continue to serve as the voice, hands and feet of Christ here on earth.

## **Description of a Well-Functioning Conference**

- 6-12 members, and welcomes new members;
- meets once or twice a month for about 90 minutes;
- begins each meeting with the prayer and an appropriate spiritual reading and reflection. The needs, wishes and preferences of the members are considered when planning and running the meeting;
- Meetings are held “in a spirit of fraternity, simplicity, and Christian joy”, providing “for consideration in common of the experiences of each member and the problems encountered in the pursuit of a better service”;
- The President is eager to serve in their position and is willing and able to lead the Conference effectively;
- The Executive members provide the President with adequate assistance and support. Members make a real effort to attend meetings regularly and to be active participants in meetings;
- Financial and other records are maintained effectively and efficiently, and are properly secured.
- Members will make a point to support and assist other members of the Conference, especially the newer or less confident members;
- Adequate and appropriate service, consistent with our Vincentian philosophy and commitment and with the available resources, is provided to those in need;
- Calls are answered in a timely and appropriate manner;
- Members always visit in pairs (as per the Screening and Risk Management policy);
- Appropriate arrangements are made with the Neighbour in Need prior to the visit;
- In all aspects of the visit, members remember that “sharing does not consist merely in the distribution of material goods” (The Rule).

## Resources:

<https://ssvptoronto.ca/member-resources/>

- [Position Descriptions for Conference Executives](#)
- **Quick Reference Guides**  
[5 Guiding Principles](#), [Home Visitation](#), Safety and Home Visitation, Providing Material Assistant, Serving Longer Term Neighbours in Need
- [GTCC Conference and Particular Council Policies](#)  
<https://ssvptoronto.ca/resources/policies-for-vincentians-and-employees/>  
Policies in italics are Vincentian focused:
  - Anti-Abuse Policy (Policy # 8)*
  - Communications Policy for members of the Society (Policy # 3)*
  - Complaints Resolution Process Policy (Policy # 23)*
  - Hiring and Assistance Policy (Policy # 13)*
  - Management of Finances for Particular Councils and Conferences Policy (Policy # 22)*
  - Membership and under the age of 18 Policy (Policy # 14)*
  - Member Screening and Risk Management Policy (Policy # 15)*
  - Non Discrimination Policy (Policy # 9)*
  - Privacy Policy (Policy # 6)*
  - Vulnerable Sector Check (Policy # 7)*
  - Whistle Blower Policy (Policy # 21)*
- [Conference President Refresher Point Presentation](#)
- [Recruitment Booklet](#)
- [What We Do summary sheet – programs and services](#)
- [Videos](#)