



## TREASURER'S REPORT

<b>BEGINNING BALANCE (REQUIRED)</b>	\$
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(PLEASE ROUND ALL FIGURES TO THE NEAREST DOLLAR)

### RECEIPTS

1. Donations from Members	\$		
2. Church/Poor Box Collections	\$		
3. Fund Raising Proceeds	\$		
4. Other SVdP Unit Contributions	\$		
5. Other	\$		
<b>Total Receipts (1 thru 5)</b>			\$
<b>Cash Available (Beginning Balance + Total Receipts)</b>			+\$

### EXPENSES

6. Those We Serve	\$		
7. Disaster Contributions	\$		
8A Domestic Twinning	\$		
8B Foreign Twinning**	\$		
<b>**Attach contact list for Foreign Twinning Partners</b>			
<b>Subtotal (A) (6 thru 8)</b>		\$	
9. Solidarity Contributions (Dues/Tithing)	\$		
10. Contributions to Upper Councils	\$		
11. Operating Expenses	\$		
12. Other	\$		
<b>Subtotal (B) (9 thru 12)</b>		\$	
<b>Total Disbursements (Subtotal A + Subtotal B)</b>			-\$
<b>Ending Balance: Cash Available – Total Expenses =</b>			
\$			

\_\_\_\_\_

Signature of Treasurer

(\_\_\_\_) \_\_\_\_\_

Phone

**“IN KIND” GOODS AND SERVICES PROVIDED (NON-CASH CONTRIBUTIONS)**

	# of People Helped	\$ Value
<b>Goods</b>		
A. Food		
B. Furniture		
C. Clothing		
D. Other		
<b>Subtotal 1 (A thru D)</b>		<b>\$</b>
<b>Services</b>		
E. Legal		
F. Medical		
G. Dental		
H. Other		
<b>Subtotal 2 (E thru H)</b>		<b>\$</b>
<b>Totals (Subtotal 1 + Subtotal 2)</b>		<b>\$</b>

**VISITS AND SERVICES TO PEOPLE**

	<b>Column 1</b>	<b>Column 2</b>
<b>Person-to-Person Visits</b>	<b># of Visits</b>	<b># of People Helped</b>
A. Home Visits		
B. Prison Visits		
C. Hospital Visits		
D. Eldercare Visits		
E. Other In-Person Visits		
<b>Subtotal (A thru E)</b>		

	<b># Contacts</b>	<b># of People Helped</b>
F. Telephone-Only Contacts		

<b>Services</b>	<b># of Services</b>
G. Jobs Obtained	
H. Referrals	
I. Travel Aid	
J. Spiritual Aid/Sacraments	
K. Other	
<b>Subtotal (G thru K)</b>	

<b>TOTAL PEOPLE HELPED (ADD COLUMN 2: A THRU F)</b>	
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<b>TOTAL HOURS OF SERVICE</b>	
<b>ESTIMATED MILES IN VINCENTIAN SERVICES</b>	

\_\_\_\_\_  
Signature of Conference President      (\_\_\_\_) \_\_\_\_\_ Phone      \_\_\_\_\_ Date

## SPECIAL WORKS

<b>Name of Special Works</b>	<b>Type*</b>	<b>Contact</b>	<b>Phone Number</b>	<b>Physical Address (with city, state, zip)</b>	<b>Administrative Address (with city, state, zip)</b>
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

*(i.e., Thrift Store, Food Pantry, Homeless Shelter, Free Pharmacy, Soup Kitchen, etc)*



## INSTRUCTIONS FOR COMPLETING CONFERENCE ANNUAL REPORT

This report form is intended to promote more timely, accurate, and consistent reporting. It is essential to have your Conference annual report completed properly and returned on time so that we can responsibly publish our consolidated National results and comply with the requirements of our tax-exempt status.

This Conference report form must be used by all Conferences. 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 Jim Woods at [jwoodssvp@verizon.net](mailto:jwoodssvp@verizon.net) or 302-478-6368.

Your cooperation is appreciated.

### DEFINITIONS:

**REPORTING PERIOD:** Always a 12-month period; fiscal year (Oct. 1 – Sept. 30).

**MEMBERSHIP:** This format requires a distinction between Active and Associate members over and under 40 years of age, by race/ethnic category. (This breakdown is required for government reporting, grant applications, etc.) Contributing members need only be reported as a total. Please note that a Vincentian member can be counted in one category only.

Active Members must belong to the Catholic Church; accept the Rule, Statutes, and Basic Requirements of the Society; be accepted as an Active Member by a Conference; and be enrolled in it. In addition, they need to take part in the life of the Conference to which they belong. Participation implies a reasonable degree of involvement in SVdP meetings, charitable activities, and religious observances.

Associate Members, like Active Members, are affiliated with the Society by formal action of the Conference or Council with which the members will be joined. Associate Members include those who sincerely and publicly accept the Society's Rule but may or may not belong to the Catholic Church. Associate Members are kept informed of the developments and activities of their immediate groupings, as well as the general progress of the Society, particularly in the local area or diocese. Associate Members are invited to attend the general meetings and special observances of the Society. They participate, as they are able, in the charitable activities of the Society in their area.

Contributing Members require no formal action for enrollment. Recognition of such status is simply granted by the Society in acknowledging the financial donations of generous or regular contributors. Contributors are invited to be present at general and special meetings.

## Filling out your Report Forms:

### TREASURER'S REPORT: Receipts

1. Donations from Members: Financial contributions 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. Donations should include the cost of goods and/or services purchased by a Society of St. Vincent de Paul Member and donated to a client.
2. Church/Poor Box Collections: Includes financial support from Church collections, Poor Box Collections, alms from distribution of religious papers at the Church door, and other Church-related offerings.
3. Fund Raising Proceeds: Includes donations from non-members not made in Church and financial support from activities not directly or exclusively Church-centered, such as bingo, raffles, suppers, and memorial donations.
4. Other SVdP Unit Contributions: Includes financial support received by your Conference from any other Vincentian entities (e.g., Councils and/or Conferences).
5. Other: All other sources of income (e.g., interest on savings).

### TREASURER'S REPORT: Disbursements

6. Those We Served: All funds expended for goods and services provided to those we served, including cash, checks, member donations, certificates, and gift cards. The principal method for payment of aid will be check, paid directly to the provider of those goods or services.
7. Disaster Contributions: Include all monies expended for disaster relief locally, nationally, and internationally.
8. A. Domestic Twinning: Funds sent to another domestic Conference or Council (over and above the solidarity contribution).  
B. Foreign Twinning: Funds sent to a Conference or Council outside of the United States.
9. Solidarity Contribution: The Annual solidarity contribution to upper Councils and Regions.
10. Contributions to Upper Councils: Funds sent to an upper Council (over and above disaster, Twinning, and solidarity contributions).
11. Conference Operational Expenses: 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:** CASH AVAILABLE (STARTING BALANCE + RECEIPTS)

- DISBURSEMENTS

= ENDING BALANCE

## **“IN KIND” GOODS AND SERVICES**

DEFINITIONS:

**“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.

**“Total number of people helped”** is simply the total number of people in the family.

**“Value”** is the estimated retail value of goods and services provided.

**DO NOT INCLUDE ANY AMOUNT FOR GOODS GIVEN OUT BY YOUR THRIFT STORES. (These dollars will be picked up in your Thrift Store report.)**

The two “In Kind” reporting columns are additive and must add downwards.

## **VISITS AND SERVICES TO PEOPLE**

**THIS SECTION DOES NOT INCLUDE “IN KIND” SERVICES.**

### **PERSON-TO-PERSON VISITS**

- 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 year, you should report 36 people helped (3 prisoners helped x 12 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).
- E. Other In-Person Visits: Any other personal visits to any other location.

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

- F. Telephone contacts: Show number of telephone contacts and total number of people helped. This category represents contact *only* by telephone; no person-to-person visit is made.

## SERVICES

- G. Jobs obtained: Include jobs secured directly through the aid of the Conference.
- H. Referrals: Include any referral to another agency, church, ministry, service provider, etc. Do *not* include referrals to another SVdP Conference or a Catholic priest/deacon/sister, etc.
- I. Travel Aid: Assistance to clients with any travel-related costs.
- J. Spiritual Aid/Sacraments (ONLY WHEN PERFORMED IN THE CAPACITY OF A VINCENTIAN): Include referrals to a Catholic religious for spiritual assistance/guidance/discussion or when a member provides a sacrament (e.g., Communion) or access to a sacrament (e.g., Confession); also include help provided with Catholic books, rosaries, etc.
- K. Other: Any other service provided. (Please attach an explanation.)

**TOTAL SERVICES:** Total of (G) through (K).

### Total Visits and Services to People

If you provide a family multiple help (e.g., “in kind” goods, a job obtained, a referral, and a home visit), show it as 1 home visit, 4 people helped (parents with two children) with 1 job obtained and 1 referral. Number of people helped is 4 (show under “Home Visit”). Under “In Kind,” just show \$ value.

**Total People Helped:** Total visits (A through E) and telephone contacts (F) to get the total number of people helped.

**Total Hours of Service:** 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.

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

**DO NOT ADD ANY HOURS WORKING AT A SOCIETY OF ST. VINCENT DE PAUL THRIFT STORE (THIS TIME WILL BE REPORTED BY THE STORE). DO NOT ADD ANY HOURS FOR WORK DONE FOR YOUR PARISH UNLESS IT IS TRULY SVDP CONFERENCE WORK.**