

Dimensions of Excellence

Conference Self Evaluation Program

Conference Name _____

#	Question	4 Points	3 Points	2 Points	1 Points	0 Points	
Basic Structure	1	Does our Conference have an elected President, who has served less than 6 consecutive years? (<i>Rule, Part III; Statute 12</i>)	We have an elected President who is within term limits.	N/A	Appointed President, OR over term President, BUT not both.	President both appointed and over term.	No President.
	2	Does our Conference have a Vice-President, Secretary, and Treasurer? (President not related to Treasurer) (<i>Rule, Part III; Statute 12</i>)	All officer positions filled by separate people.	Two officer positions filled.	One officer position is filled.	New or Revitalized Conference, actively looking for officers.	Conference has 3 or fewer members.
	3	Does our Conference promote the formation and training of members and cultivate new Officers? (<i>Archdiocesan Strategic Goal 1:B) Rule, Part I; Article 3.12; Manual pp. 20-21</i>)	All members are encouraged to take part in formation & training - including formation for future officers.	Either general training or leadership formation is encouraged but not both.	We neither encourage nor discourage training and leadership formation within our Conference.	We are working on a plan to encourage training in the future.	We discourage all training within our Conference.
	4	Does our Conference openly discuss within its regular meetings how to help those whom we serve? (<i>Rule, Part III; Statute 16</i>)	All Vincentians attending meetings are included in discussions.	Only a subgroup of Vincentians are included in discussions.	Only officers included in discussions.	We do not have a standard practice.	President decides.

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Friendship	5	Does our Conference promote friendship among its members and opportunities for mutual spiritual growth? (<i>Rule</i> Part I, Articles 2.2, 3.3, <i>Manual</i> pp. 22, 50)	We actively promote friendship and spiritual growth among our members.	Occasionally, we encourage internal group activities.	We only focus on external activity with clients.	N/A	There is open hostility between members of our Conference.
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Membership/ Recruitment	6	Is our Conference open to all (<i>Rule, Part I; Article 3.2 and Part III; Statute 3</i>), are new members formally commissioned and do all members renew their promise of service (<i>Rule: Part III, Statute 4</i>)?	We accept all members regardless of gender, wealth, occupation, social status or ethnic origin, & hold BOTH commissioning & renewal.	We don't discriminate but only hold commissioning OR renewal but not both.	N/A	We don't discriminate as to membership but have neither commissioning nor renewal.	There are certain groups of people we will not allow to be Vincentians in any capacity.
	7	Does our Conference take part in the annual member drive and actively recruit throughout the year? (<i>Archdiocesan Strategic Goal 1:A:5, Manual, pp. 28-29</i>)	We actively, and formally recruit members more than once a year.	We actively, and formally recruit members during the annual drive.	We actively recruit members, but with no formal program.	We are working on a recruitment program.	No active recruitment interest.
Meetings	8	How often does our Conference meet face to face for a scheduled meeting? (<i>Rule, Part I Article 3.3.1, Part III; Statute 5, Manual, pp.21-22</i>)	Three to four times a month.	Twice a month.	Once a month.	Only when needed.	We don't meet face to face.
	9	Does our Conference use a formal agenda during meetings? (<i>Rule, Part III; Statute 7, Manual, p.22</i>)	Yes, and all members have a chance to add to it.	Yes, we use the same thing most meetings.	Sometimes.	No, but we look to in the future.	No interest.
	10	Does our Conference send our President or other representatives to District Council Meetings? (<i>Rule, Part I; Article 3.6, Manual pp. 33-36</i>)	We <i>always</i> send one or more representatives.	Yes, about 75% of the time.	Yes, more than 50% of the time.	Yes, but less than 50% of the time.	We do not send a representative to District Council Meetings.

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Accountability/ Annual Reports	11	Does our Conference maintain financial records and conduct an annual audit of Conference financial records? (<i>Rule</i> , Part III; Statute 22, 23, 26 & 27, <i>Manual</i> , pp. 30-31)	We maintain detailed financial records and independently audit of the books annually.	We maintain detailed records & have an outside audit of the books at least every 6 years.	We maintain detailed financial records but never have an outside audit.	We maintain minimal financial records.	No official financial records.
	12	Does our Conference maintain records on those we serve (<i>Manual</i> pp. 30-31), have Confidentiality Policies (<i>Manual</i> , pp. 23-24), and a Record Retention Policy (<i>Manual</i> , pp. 31-32)?	We maintain records of those we serve in accordance with our Record Retention & Confidentiality Policies.	We maintain records & are in the process of adopting Record Retention/ Confidentiality Policies.	We maintain minimal client records, but don't currently have a Record Retention or Confidentiality Policy.	No official records kept, but working on improving.	No official records kept. No Record Retention or Confidentiality Policies.
	13	Does our Conference pay Solidarity to the Archdiocesan Council? (The Archdiocesan Council redistributes a portion of these funds to meet your National and District obligations.) (<i>Rule</i> , Part III; Statute 24)	We meet or exceed our Solidarity EVERY year.	We meet or exceed our Solidarity MOST years.	We pay towards our Solidarity but never make the full payment.	Sometimes we pay, sometimes we don't.	We never pay our Solidarity.
Stewardship of Funds	14	Does our Conference raise funds? (i.e. Bake sales, Poor Boxes, Special Collections) (<i>Rule</i> , Part III; Statute 25, <i>Manual</i> pp. 26-27)	We have a regular source of income & are always exploring different fundraising efforts.	We have a regular source of income.	We try, but do not have a regular source of income.	We have no plan for raising funds but are looking for new ways.	We have given up, or do not try.
		Does our Conference maintain separate financial records from the Church/Parish? (i.e. separate Bank	We keep all funds separate from our	N/A	N/A	We are working	Funds are combined. No

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	1 5	Accounts, file taxes under SVdP's 501(c)3 Number (Rule, Part I; Article 5.2, Manual, p 30)	local Parish.			towards separating accounts.	plans to change.
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Parish Relationship	16	Does our Conference regularly give our Pastor updates on our SVdP activities? (<i>Rule</i> , Part I; Article 5.1, 5.3, Part III, Statute 23)	We send our Pastor updates at least quarterly.	We send our Pastor updates at least once a year.	We update our Pastor only when he asks for information.	We do not talk to our Pastor, but we do not hide information.	We actively hide information from our Pastor.
	17	Does our Conference regularly update our parish/benefactors on our SVdP activities? (i.e. bulletins or other announcements) (<i>Manual</i> , p. 18)	We regularly inform our Parish about the types of assistance & number of people helped by SVdP.	We provide updates to our parish/benefactors on an annual basis.	We do communicate with the parish/benefactors , but not with any scheduled regularity.	We have no formal presence within the parish, but are working on a plan.	No updates provided.
Home Visits	18	Does our Conference make home visits? (defined as meeting in the person's actual home) (<i>Rule</i> , Part III; Statute 8, <i>Manual</i> , p. 23)	We go to every client's home if possible and prudent.	We go to most client's homes.	We meet at the Parish office (or similar place).	We do not meet clients face to face but actively help.	We do not actively help clients.
	19	Does our Conference provide mentoring and formally train members to do home visits? (Such as sending them to a Home Visit workshop) (<i>Rule</i> , Part I; Article 1.7-1.12)	We provide mentoring and formally train to all individuals who make Home Visits.	NA	We provide mentoring and formal training to most of individuals who make Home Visits.	We provide only mentoring for individuals who make Home Visits.	We do not do home visits.

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	20	Does our Conference use prayer when making a home visit? (Ideally; before, during, and after) (<i>Rule</i> , Part I; Article 1.7)	Always and all three times.	At least once around a visit.	Only about 50% of the time.	We do, but less than 50% of the time.	We have not used prayer around home visits.
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Spiritual	21	Does our Conference have a Spiritual Advisor who is trained in Vincentian Spirituality and attends conference meetings and similar St Vincent activities? (<i>Rule</i> , Part III; Statute 15, <i>Manual</i> pp.48- 49; 50-73)	Our Spiritual Advisor meets both criteria.	Our Spiritual Advisor meets one of the criteria.	Our Spiritual Advisor is not trained, and only attends meetings from time to time.	We are looking for a Spiritual Advisor.	We have no Spiritual Advisor.
	22	Does our Conference spend time on prayer, reading, and discussion about how the gospel is reflected in our work? (<i>Rule</i> , Part I, Articles 2.2, 2.3,3.3 Part III; Statute 7, <i>Manual</i> pp. 21-22)	Always, we never miss our time for spiritual growth.	We do, but sometimes we cut it out for sake of time.	Only about 50% of the time.	We do, but less than 50% of the time.	We do not pray at our meetings.
Twinning	23	Does our Conference ever help another Conference with financial and material assistance? (<i>Rule</i> , Part I; Article 4.1, <i>Manual</i> pp. 46-47)	We actively seek others to Twin within these ways.	We do not have the resources to Twin in these ways OR only Twin when asked.	We try to avoid Twinning.	We have not Twinned, but would consider Twinning in the Future.	We refuse to Twin in these ways.
	24	Does our Conference ever help another Conference with non-financial or non-material assistance? (i.e. Prayer or Manpower) (<i>Manual</i> , p.27)	We actively seek others to Twin within these ways.	We do not have the resources to Twin in these ways OR only Twin when asked.	We try to avoid Twinning.	We have not Twinned, but would consider Twinning in the Future.	We refuse to Twin in these ways.
Advocacy	25	Does our Conference do anything to seek mid-term and long-term solutions to poverty (also known as Systemic Change)? (<i>Rule</i> , Part I; Article 7, <i>Manual</i> , p.26 Sec. E)	We actively seek ways to implement Systemic Change as a Conference.	We encourage our members to engage in Systemic Change as individuals.	We use meeting time to talk about current events that affect those we serve.	We are currently trying to learn about/ understand Systemic Change.	We do not address systemic change.

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Add up points per column:

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