



Bookkeeping Procedures For SSVP Conferences

Society of St. Vincent de Paul (Scotland) is a Company Limited by Guarantee Registered Company Number SC347803 Registered Charity SC006326 Tel. No: 0141 226 8833 Email: admin@ssvpscotland.com
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1. Introduction

Willingness to hold office as a vocation: -

“It is not against humility to be willing to make your contribution by taking office, if your principal motive is to serve, and if you have the time, ability and energy to do so. Indeed, every member should be willing to take office at some time in their Vincentian life. The offices of President, Vice-President, Secretary and Treasurer provide great opportunities to serve the other members and to enable our work to flourish”.

The Mind & Heart of a Vincentian - David Williams

It is in this spirit that the Society appreciates the important contribution which members contribute to the financial management of SSVP Scotland.

A Treasurer with any concerns or difficulties can contact their Group or Diocesan President, or those nominated by them e.g. Diocesan Treasurer, for guidance and advice. Additionally, staff at the National Office are also available to offer advice or guidance.

2. Cash Book

2.1 General

It is the responsibility of the Conference President on a regular basis, at least monthly to initial the appropriate column in the cash book to show that entries and calculations have been checked. If a Conference has a President/Treasurer doing a dual role, then another signatory or office bearer should initial the books as correct.

There is a Spread Sheet template for the Cash Book that can be downloaded from the SSVP Scotland Website which Conferences may find helpful:

[https://www.ssvpscotland.com/members/publications/cash book](https://www.ssvpscotland.com/members/publications/cash%20book)

Weekly:

Complete the relevant columns for all income and expenditure.

Members who count the income from collection boxes should sign in the “Details” column to confirm the amount entered.

The total for each **row** is calculated and entered into the Total columns. The new balance is calculated and entered in the Balance columns.

Monthly:

At the end of each month, all columns are to be totaled. The sum of the total income columns should represent the TOTAL Income and the sum of the total expenditure columns should represent the TOTAL payments.

Additionally, at the bottom of each page, column totals, are carried forward to the top of the same columns on the following page.

At the end of the financial year (31st March) the final balance only is carried forward to the new financial year (1st April).

2.2 Income (See Appendix 1)

Post income to the appropriate column per column heading:

Opening Balance: On 1st April the closing balance at 31st March is entered at the top of columns Opening Balance and Total Income.

Collection Boxes: Money collected in SSVP collection boxes.

Secret Collection: Money collected at the Conference Meeting.

Interest: Interest received from the Conference Bank Account.

Income from SSVP: Money received from other Conferences, Group Council, Diocesan Council or National Council. This category of income is also required to be recorded on the form "Analysis of income from within SSVP Scotland" (see appendix 4a). This is a financial year end audit requirement.

Legacies and Grants: Income received from any Legacy or Grants received from Local Authorities or others. **Retain supporting paperwork and send a copy with the annual audit form, to the National Office for the Annual Audit.**

Other Income: Donations, Fundraising or Flag Day etc.

Total Income: Represent the sum of each row.

Conference President Initial: The president should initial to confirm accuracy of entries.

Carried forward: At the end of each month, all columns are to be totaled. The sum of the total income columns should represent the TOTAL Income.

2.3 Expenditure (See Appendix 1)

Post Expenditure to the appropriate Column per the Column heading.

Relief: All payments connected with any help given by your Conference or Council to families/homes or individuals. This **includes** cost of transport to Society caravans, cost of bus outings, Christmas parties, food, clothing, furniture etc. and also monies given to Food Banks (**only** if there is an SSVP member involvement in operating the food bank), Nursing Homes & Hospices for patients' comforts.

Dues: Paid quarterly by Direct Debit to the National Office and Diocesan Council.

N.B. Enter each payment (National & Diocesan) in the Dues column on the 19th of June, September, December and March.

Twinning: If a Conference has adopted an overseas twin (currently, £40 quarterly per twin) this is paid quarterly by Direct Debit to the National Office.

N.B. Enter payments in the Twinning column on the 20th of June, September, December and March.

Additional ad hoc donations, sent to the National Office, to support overseas **Projects, Students** and **Special donations** to the Conference Twin are also entered in this column.

Other paid to SSVP: Payments **within** SSVP Scotland to other Conferences, Group Councils, Diocesan Councils, Special Works. Also, payments to National Office for National Meeting costs, Appeals, Resources e.g. Cash Book, Card & Medal Sets etc. (See appendix 4b). **N.B.** Conferences receiving monetary donations from within SSVP Scotland must first record the donation as income from SSVP and if and when paying out record as appropriate.

Expenses: Payments connected with the administration of your Conference or Council. e.g. postage; envelopes; mobile phone top up; costs for local meetings e.g. travel & consumables; stipends for Masses. An invoice or receipt is required.

N.B. This does not include payments connected in any way with help given in the form of relief.

Other payments(e.g. all payments to NON SSVP Scotland charities or other organisations. This includes Vincentian family members as detailed below.

VINCENTIAN FAMILY IN SCOTLAND: - comprises

DAUGHTERS OF CHARITY

ST JOSEPH'S SERVICES

THE LOUISE PROJECT AND SPACE

THE LISTENING HEART

AIC – INTERNATIONAL ASSOCIATION OF CHARITIES

N.B. – additional notes regarding donations to

VINCENTIAN FAMILY ORGANISATIONS — A maximum of £2000 in total per annum can be donated. This can take the form of 1 donation to a group member or multiple donations to different groups , but the overall total must not exceed £2000.

ANY OTHER CHARITY, GROUP OR ORGANISATION INCLUDING THE CATHOLIC CHURCH — a maximum of £2000 in total per annum can be donated, however the receiving organisation must have the same purpose as SSVP Scotland namely the relief of poverty. In addition, the receiving charitable organisation must have a Vincentian member involvement in the running or operation of the organisation. The £2000 can be disbursed in 1 payment to a qualifying organisation or multiple payments to different qualifying organisations. The proof of the payment required.

If a conference wishes to donate in excess of the £2000 they **must seek prior approval from the SSVP Scotland trustees** via their diocesan council .The application must quote the name of the receiving organisation, their charity number ,if they have one, total amount of the annual donation{s}, reason for donation and signed and dated by the conference president and treasurer.

Total Payments: represents the sum of each row.

Balance:

The total for each row should be shown and the new Balance calculated by adding income entries to the existing balance, deducting payments and entering the new figure into the Balance column.

Carried forward: At the end of each month, all columns are to be totaled. The sum of these individual column should represent the TOTAL payments and carried forward to the next page.

Balance at 31 March: The figure should reflect the current year's closing balance in your Cash Book and the balance will be carried forward to next year. The amount in this box should be the same as the actual **reconciled** bank balance as at 31st March.

2.4 Bank Reconciliation (See Appendix 2 and 3)

It is recommended to reconcile the balance on bank statement to the balance in the Cash Book monthly or at least quarterly.

See the bank reconciliation example below and the type of adjustments required to ensure the bank balance equals the balance on the cash book.

Bank Statement Balance Reconciliation with Cash Book Balance

1. Balance as per the Bank Statement	£592.36
2. Deduct total of cheques issued by Conference or Council recorded as payments in the cash book but not shown yet on the bank statement.	£100.00

	£492.36
3. Any income (cheques, cash, bank transfers) shown on the bank statement but not entered yet into the cash book should now be added to the cash book.	£ 50.00
4. Add Cash in hand not yet banked but previously recorded as income in the cash book to the bank balance.	£ 57.35

5. Total Balance	£599.71
	=====

To assist Conferences in identifying and correcting errors quickly it is recommended that a Monthly procedure is followed **(see Appendix 3)**

3. Financial Year End (31st March) & SSVP Annual Audit

3.1 Introduction

Each year, to meet regulatory responsibilities, SSVP Scotland are audited by an external Accountancy firm. Additionally, to prepare for the Audit, Conferences complete an Annual Financial & Statistics Audit Form. It is the responsibility of the National Office to collate on the financial returns from every Conference.

Additionally, the auditor randomly selects approximately 25 SSVP Scotland Conferences. The National Office will write to these Conferences and request the cash book, bank statements and supporting documents for the full financial year.

3.2 Annual Financial & Statistics Audit Form -(see Appendix 5)

3.2.1 Financial Summary: Income – on notes

Opening Balance: This figure should be the same as the closing balance at 31st March of the previous financial year.

Insert total annual income from 1st April – 31st March

Collection Boxes: Money collected in SSVP Scotland collection boxes.

Secret Collection: Money collected at SSVP Scotland Conference Meetings.

Interest: Interest received from the Conference Bank Account.

Income from SSVP: Money received from other Conferences, Group Council, Diocesan Council or National Council, Special Works. A detailed analysis of this total amount should be recorded in the section headed** income from SSVP on the audit form with a detailed breakdown of the total on the appendix 4a form.

Legacies and Grants: Income received from any Legacy or Grants received from Local Authorities or others. **Retain supporting paperwork and send a copy with the annual audit form, to the National Office for the Annual Audit.**

Other Income: Donations, Fundraising or Flag Day etc. Detailed analysis of the total amount should be recorded in the section ** other income.

Total: Represent the sum of the income column.

3.2.2 Financial Summary Expenditure – supporting notes

Insert total annual expenditure from 1st April – 31st March

N.B. See Rules regarding payments to other organisations.

Relief: All payments connected with any help given by your Conference or Council to families/homes or individuals. This **includes** cost of transport to Society caravans, cost of bus outings, Christmas parties, food, clothing, furniture etc. and also monies given to Food Banks (**only** if there is an SSVP member involvement in operating the food bank), Nursing Homes & Hospices for patients' comforts.

Dues: Quarterly payments to the National Council and Diocesan Council.

Twinning:

All payments to Twinning: All monies relating to Twinning including quarterly Twinning payments and payments to support Projects, Students, and Special Donations.

All payments/donations WITHIN SSVP: Complete **Section A:** Details of All Payments/Donations within SSVP and all cheques sent to National Office (e.g. National Meeting Costs, Appeals, National, Diocesan, Special Works, Group Projects, Stationery Invoices – **Not Dues or Twinning**)

The total of all payments to be listed in Box A should agree with the total included within the Financial Summary part of the Audit Form.

Conference Administration Expenses: Complete **Section B:** Details of Conference administration costs & Members expenses e.g. postage, envelopes, mobile phone top up, costs for local meetings, Mass stipends. This does not include payments connected in any way with help given in the form of relief.

All payments to be listed in Box B and should agree with the total included within the Financial Summary part of the Audit Form.

Other payments(e.g. all payments to NON SSVP Scotland charities or other organisations). This includes Vincentian family members as detailed below.

VINCENTIAN FAMILY IN SCOTLAND: - comprises

DAUGHTERS OF CHARITY
ST JOSEPH'S SERVICES
THE LOUISE PROJECT AND SPACE
THE LISTENING HEART
AIC – INTERNATIONAL ASSOCIATION OF CHARITIES

VINCENTIAN FAMILY ORGANISATIONS — A maximum of £2000 in total per annum can be donated. This can take the form of 1 donation to a group member or multiple donations to different groups, but the overall total must not exceed £2000.

ANY OTHER CHARITY, GROUP OR ORGANISATION INCLUDING THE CATHOLIC CHURCH — a maximum of £2000 in total per annum can be donated, however the receiving organisation must have the same purpose as SSVP Scotland namely the relief of poverty. In addition, the receiving charitable organisation must have a Vincentian member involvement in the running or operation of the organisation. The £2000 can be disbursed in 1 payment to a qualifying organisation or multiple payments to different qualifying organisations.

If a conference wishes to donate in excess of the £2000 they **must seek prior approval from the SSVP Scotland trustees** via their diocesan council. The application must quote the name of the receiving organisation, their charity number, if they have one, total amount of the annual donation{s}, reason for donation and signed and dated by the conference president and treasurer.

Balance as at 31st March This is the final cash book balance and should agree with the reconciled bank statement balance.

Please note it is important that the bank statement that accompanies your audit form includes transactions up to and including 31st March. All cheques issued on or before the 31 March should be treated as the current year's expenditure even if not presented by 31 March.

Total Figure for Income & Expenditure should be the same.

4. Dues

National Dues are worked out using the net income from the last financial year. This information comes from the Annual Audit Form.

The **Net income** means donations and interest only, and it does not include grants, legacies or donations from other parts of SSVP Scotland.

The Dues are paid four times a year (quarterly). The payments can be made by standing order, bank transfer or cheque between 19 December and 19 September.

The National Office calculates how much each Conference must pay and tells them by the end of November each year.

At present, National Dues are 12% of the net income from the previous financial year.

Diocesan Dues are different, as each Diocese sets its own rate based on its needs

5. Finance Procedures for the Conference Merger Process

These steps must be completed as part of the conference merger, and all required documents must be sent to the National Office.

- The Diocesan President must inform the National office of the merger.
- Let parishioners of both churches know about the conference merger.
(If parishioners make regular donations to the conference, bank details may need to be updated.)
- Appoint the new office bearers.
- Complete the Merger Summary Form. (Appendix 6)
(New members will need a Member ID number.)
- Agree on which conference code will be used for administration.
- Agree on which bank account will be kept.
(For audit purposes, the bank account name must match the conference name. If it does not, ask the bank to update it.)
- Tell the bank about any new signatories on the retained bank account.
- Close the bank account that will not be kept by:
 - Cancelling any standing orders.
 - Transferring the remaining balance to the merged conference.
 - Once all transactions are complete, closing the account and obtaining a final bank statement showing a £0.00 balance and confirmation of closure.
- Make sure all cash book entries are up to date.
- Reconcile the cash book of the conference being closed with the bank statement and petty cash.
(Records of any transfers or use of petty cash must be included.)
- Complete the audit for the conference that is not being retained.
(All financial documents must be sent to the National Office.)
 - Complete the final audit form, dated on the conference merger date.
 - Provide the final bank statement showing a zero closing balance.

- Send the cash book and all supporting accounting documents.
- Include the Relief Book, if one was used.

All documents from the conference that is not being retained can be sent to the National Office for archiving, unless the merged conference prefers to keep them.

6. Conference Closure Procedures

If the Conference decides to close, the conference president or member must inform Diocesan President of intent to close. The Diocesan President must inform the National Office as soon as possible.

Steps to Follow When Closing a Conference

- Make sure all financial transactions are recorded in the Cash Book.
- Ensure all details are completed in the Relief Book, if it is used.
- Check that the Cash Book balance matches the bank statement balance and petty cash balance.
-
- If there is money left in the account, write a cheque* or the bank transfer to the Diocesan Council and send it to the Diocesan Treasurer. The record of petty cash usage should be provided.
- Confirm to the Head Office that the bank account has been closed and include a **copy of the final bank statement showing a balance of £0.00.**
- A completed audit form must be provided and dated on the closure date
- The Diocesan Treasurer must send all accounting records, including books, documents, audit form and invoices, to the Head Office.

* The cheque amount may be returned if the Conference re-opens within one year of the closure date.

7. Appendices

Appendix 1

[illegible]

Appendix 2

Bank Statement Balance Reconciliation with Cash Book Balance

1. Balance as per the Bank Statement	£592.36
2. Deduct total of cheques issued by Conference or Council recorded as payments in the cash book but not shown yet on the bank statement.	£100.00

	£492.36
3. Any income (cheques, cash, bank transfers) shown on the bank statement but not entered yet into the cash book should now be added to the cash book.	£ 50.00
4. Add Cash in hand not yet banked but previously recorded as income in the cash book to the bank balance.	£ 57.35

5. Total Balance	£599.71
	=====

Appendix 3

Monthly Reconciliation Procedure – Supplementary Notes

- 1) Conference Treasurer should keep a note of the Direct Debit Payments and ensure that these are entered into the Cash Book at the date of payment detailed in the Direct Debit Mandate and not wait until the Bank Statement is received.
- 2) At the end of each month the Conference Treasurer should ensure that the Cash Book arithmetic is correct or amend where necessary.
- 3) Conference Treasurer should liaise with the member responsible for the Relief Book if used to ensure that the Relief Book totals correspond with that shown in the Cash Book.
- 4) Having completed 2) and 3) above the Conference Treasurer should produce for the Conference President a Bank Reconciliation showing that the Reconciliation Balance corresponds to the Cash Book Balance. This should be done using the latest available Conference Bank Statement which is not necessary the Bank Statement for the month being checked. See Appendix 2
- 5) Prior to signing off the Conference Cash Book at the end of the month the Conference President should check and ensure that the above 2), and 4) show the same correct end of month Balance, and if not request that the Treasurer recheck the calculations.

Some Conferences complete the Total of Income and Expenditure on a quarterly basis, not monthly, and also receive quarterly Bank Statements. These Conferences can continue with this and where monthly practices are stated in the Bookkeeping Procedures this can also be interpreted as quarterly.

There is a Spread Sheet template for the Cash Book that can be downloaded from the SSVp Scotland Website which Conferences may find helpful:

[https://www.ssvpscotland.com/members/publications/cash book](https://www.ssvpscotland.com/members/publications/cash%20book)

Appendix 4a

Analysis of Income from within SSVP Scotland

To allow a full analysis of this income and provide an accurate audit trail of internal SSVP income, Conferences are recommended to complete this form as required. This record will be particularly helpful at the time of the Annual Audit when a full analysis of this income is required, so you may find it helpful to update it throughout the year.

Income from SSVP: Money received from other Conferences, Group Council, Diocesan Council, National Council or Special Works (including the closure procedures transfer).

[illegible]

Please return this template with your Annual Financial Audit Form

Appendix 4b

Analysis of Payments within SSVP Scotland

To allow a full analysis of payments and provide an accurate audit trail of internal SSVP payments, Conferences are recommended to complete this form as required. This record will be particularly helpful at the time of the Annual Audit when a full analysis of payments is required, so you may find it helpful to update it throughout the year.

Payments from SSVP: Money given to other Conferences, Group Council, Diocesan Council, National Council or Special Works (including the closure procedures transfer)

Diocesan/Group/Conference Name	Date	£	p
Annual Total Received 1/4/_____ to 31/3/_____			

Please return this template with your Annual Financial Audit Form.

Conference Code & Name

Annual Financial & Statistics Audit Form

SSVP Office Bearers are asked to ensure this form is accurately completed and signed. Return one copy to National Office, Society of St Vincent de Paul, Regent House, 113 West Regent Street, Glasgow, G2 2RU

Please return the Audit Form and Supporting Information by Friday 8th MAY 2026 to the National Office

*Conference Contact Number _____ *Conference Email _____

*** This non-personal information will be given to those seeking assistance in your area.**

Number of members in the Conference: Total _____ Active _____ Non active _____

Closing Balance 31st March 2025 £

Financial Checklist:

**Treasurer
Please
Tick**

**Checker
Please
Tick**

1. The opening balance on the return and in the cashbook agrees with the closing balance on the previous year's return as supplied by National Office (see above)
2. The closing "Balance at 31st March 2025" on the annual return reconciles with the "Balance on Bank Statement" (or deposit book) after adjustments.
3. Each box in the "Financial Summary" equals the cumulative total in the corresponding column of the cashbook, and the "TOTAL" of the income and expenditure columns agree and initialled by the conference president.
- 4 The breakdown of "Income Analysis" and "Expenditure Analysis" are correctly totalled and agree with the respective figure in the "Financial Summary".
5. The amount of Dues and Twinning is entered correctly.
6. The Independent Checker has evidenced a sample of 3 expenditure items e.g. one week's relief checked against list in Relief Book (if in use), one cheque payment against the receipt, one dues payment against Conference Bank Statement, and that the Bank Statement attached covers 31st March 2025.
7. The Independent Checker has checked classification of expenditure is correct and items in the Relief Book (if in use) are, in fact, Relief.
8. The Independent Checker has checked copy of the Bank Statement at 31st March 2026, and any Legacy & Grant paperwork is attached to the National Office copy of the Annual Return.
9. Complete the attached Bank mandate. The two signatures required from the current bank signatories.
10. Complete the required Bank Details and Bank signatories information.

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Bank Account

Bank Account Name

Name of Existing Signatories in the Bank:

Contact Phone Number:

Contact Email address:

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Society of St Vincent de Paul (Scotland) – Bank Mandate for Audit Purposes

Bank Name:

Bank Address:

Bank Address:

Post Code:

Conference Bank Account Name:

Sort Code:

Account Number

Dear Sir,

We hereby authorize you to supply to our auditors, Armstrong Watson Audit Limited, Caledonia House, 89 Seaward Street, Glasgow, G41 1HJ, with immediate effect, any information they may require for audit purposes. This mandate will remain in force for all current and future accounting periods until we notify you to the contrary.

Yours faithfully,

Account Signatory Signature

Account Signatory Name (Print)

Account Signatory Signature

Account Signatory Name (Print)

Date:

Conference name:

Conference code:

FINANCIAL SUMMARY

INCOME			£	P	EXPENDITURE			£	P
Opening Balance			552	62	Relief (inc. group activities, donations to foodbanks, furniture, transport, caravan holiday expenses)			1700	00
Box Collection			1582	35	Dues (National and Diocesan)			252	00
Secret Collection			149	00	All payments to Twinning (inc. Special Donations, Projects & Students)			240	00
Interest			0	00	All payments/donations WITHIN SSVP (Section A)			553	26
Income from SSVP * (please give details)			200	00	Conference Administration Expenses (Section B)			49	00
Legacy (include paperwork)			500	00	All payments/donations OUTWITH SSVP (Section C)			350	00
Grants (include paperwork)			500	00					
Other Income ** (please give details)			260	00	Balance at 31st March 2025 †			599	71
TOTAL			3743	97	= TOTAL			3743	97

List details of closing balance adjustments at 31st MARCH 2025: -

Balance on Bank Statement		£ 592.36
Deduct total of cheques issued but not presented	-	<u>£100.00</u>
		£492.36
Add total of cheques received but not presented	+	£50.00
Add Cash in Hand	+	£ 57.35
		<u> </u>
Balance at 31st March 2025 (this must agree with † above)	=	<u>£599.71</u>

INTERNAL REPORT

Before you sign this form, please ensure that:

1. The Treasurer has completed the Financial Checklist – see front page.
2. The Income & Expenditure figures balance.
3. A copy of the Bank Statement at **31st March 2025**, and any **Legacy & Grant paperwork** is attached to the National Office copy of the Annual Return.

We certify this to be a correct and accurate statement of the Conference accounts:

President's signature _____ Print name _____

Treasurer's signature _____ Print name _____

INDEPENDENT CHECKER'S REPORT

1. Complete the Financial Checklist – see front page.
2. Please comment below on the outcome of your inspection of the financial records, detailing any relevant comments or advice given.

I confirm that I am independent from the Conference:

Checker's signature _____

Print name _____ 20 _____

Date of Check	
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Income Analysis (If there is insufficient space, please attach a supplementary list)

*** Income from SSVP**

**** Other Income**

Diocesan/Group/Conference Name	£
GL01 042 St Vincent's Conference Name, Town	200.00
Total	200.00

Details	£
A. Person Donation	40.00
Flag Day	220.00
Total	260.00

Expenditure Analysis (If there is insufficient space, please attach a supplementary list)

A	Details of all Payments/Donations within SSVP and all cheques sent to National Office (e.g. National Meeting Costs; Appeals; National, Diocesan, Group Projects; Stationery invoices. - Not Dues or any Twinning payments inc Special Donations, Projects & Students)					
	Description	£	P	Description	£	P
	National Meeting	22	00	Card & Medal Sets	11	26
	Cash Book	20	00	Special Works Conference	200	00
	Appeal	200	00			
				Total	553	26
B	Details of Conference Administration Costs & Members Expenses – Not Relief (e.g. Stipends; Postage; Cost of local Conference meetings – not National Meeting.)					
	Description	£	P	Description	£	P
	Envelopes & Stamps	9	00			
	Mobile Phone Top Up	20	00			
	Stipends	20	00			
				Total	49	00
C	Details of all payments out with SSVP (e.g. other Vincentian Family Projects or Local groups where the Conference has a direct involvement .) The total amount should not exceed £2000 per year					
	Description	£	P	Description	£	p
	The Space Project	350	00			

			Total	350	00
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Member Activity Statistics If a family receives more than 1 form of assistance (ie food and furniture) please count as 1 in each section.	Totals
Number of Home Visits Social, Loneliness, Troubled (2 Members = 2 Visits)	
Food Purchase Visits (2 Members = 2 Visits)	
Food Collection Visits (customer donation collection) (2 Members = 2 Visits)	
Number of Families Assisted - Food	
Number of Families Assisted - Utilities	
Number of Families Assisted - Clothing	
Number of Families Assisted - Holidays/Respite	
Number of Families Assisted - Furniture	
Number of Families Assisted - People transported to Mass	
Number of Families Assisted – Outings/Social Activities	
Number of School Visits (2 Members = 2 Visits)	
Number of Hospital Visits (2 Members = 2 Visits)	
Other	

Please detail all other caring work and social justice activities

Any other comments regarding activities

Members Data:

Members deceased during the year

Name	Office Held

Conference Members

Please complete the following table:

- If no email available, please provide a postal address
- Please select Member, Inactive or Auxiliary member – score through incorrect options
- PVG: If not required state N/A 22
- Age Group: Please enter either 18-30, 31-50, 51-65, 66-80 or >81

[illegible]

Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group
Active/Inactive/Auxiliary Member Name				
Email	Phone	PVG Number	PVG date obtained	Age Group

Conference IT Audit:

As we move to an increasingly digital age, we are keen to understand the opportunities or challenges this poses to conferences. Please provide answers to the questions. There is space for comments provided.

Does your conference have access to:

- A laptop or Computer or other electronic device? Y/N
- A printer? Y/N
- Wi-Fi or Internet connection? Y/N
- A computer camera (for online meetings)? Y/N
- A computer microphone (for online meetings)? Y/N
- Are you happy to join some group, diocesan or national level training and meetings on line? Y/N
- Would you like IT training? Y/N

Comments:

Signed _____ Secretary

Print name _____

Date _____

Annual Members Data Audit Form is enclosed and should be Reviewed, Updated and Returned, with The Financial Audit Form, to The National Office

For National Office Use:

Date received:

Received by:

Date checked:

Checked by:

Dio Financial Summary Completed by:

Date:

Dio Statistics Completed by:

Date:

Scanned by:

Date:

Signed off by:

Notes

Appendix 6



Conference Merger Summary Form

This form is to be completed with the
Conference Merger Procedure Checklist and returned to the National Office.

Has the Diocesan President agreed the merger?

Y/N

If No, let the Diocesan President know before proceeding.

Diocese: _____

Conference Code No.: _____ Conference Name: _____

Conference Code No.: _____ Conference Name: _____

Date of Merger: _____

New Conference Office Bearers

President :

Vice President: _____

Treasurer: _____

Secretary: _____

Conference Correspondent for communication: _____

New Conference Code: _____

New Conference Name: _____

Name of Twin(s) (if applicable) to be transferred to newly merged conference or relinquished:

Meetings held every: Week/Two Weeks Day _____ Time _____

Place _____ Spiritual Director

Bank Account Details:

Bank Name: _____

Account title: _____

Sort Code: _____ Account No.: _____