

Conference Secretarial Return Guidance


The purpose of our Secretarial Return is to collect data on Conference activity each year for the period from 1st April to 31st March for the previous 12 months. ***This guidance relates to activity carried out by the Conference between 1st April 2023 and the 31st March 2024. A final submission can be made from the 1st April 2024.***

The Secretarial Return is a vital administrative tool as it enables us to ensure compliance with our statutory obligations such as; the production of the SVP Annual Report and Accounts, Insurance provision for Members, Safeguarding (DBS) and Data Protection. We also use the data for applications to secure grants for the Society which are essential to ensure financial sustainability of the services we offer to those in need.

In order to collate the information from our 900+ Conferences, we ask that you complete your Secretarial Return online where possible, so all the information can be collated easily. For those Conferences that are unable to complete their return online, please use the template provided and when completed, e-mail it to Giulia Fabbriotti – Giuliaf@svp.org.uk

Procedure – Entering Secretarial Return Data

Preparing your data to be entered into the Secretarial Return

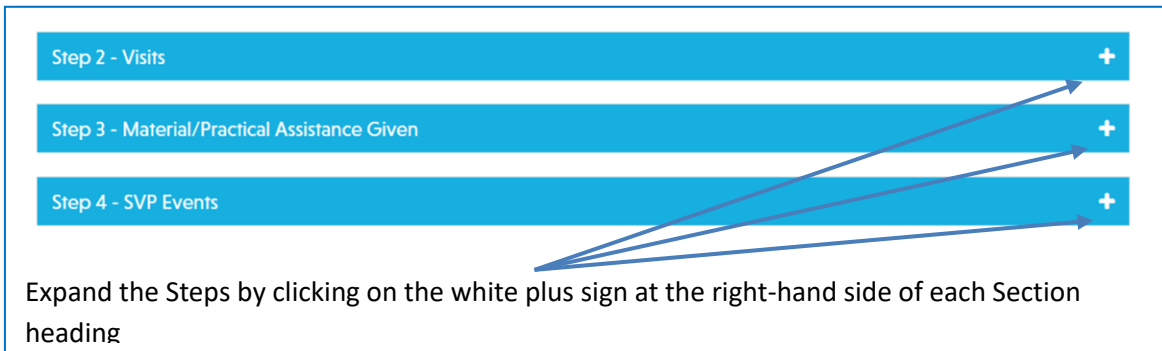
 *It is recommended that you download and complete the template prior to attempting to enter your data directly into the online form.*

When you are ready to input your data into the online Secretarial Return

The first thing you need to do is log into the Members Area of the SVP Website





1. On the Conference Bulletin Board homepage, click on the “Secretarial Returns” link, then click on the “Conference Secretarial Returns” link from the left-hand side menu.
2. Click on the blue “Enter Data” button to start completing your Secretarial Return. The status should be showing as ‘Open’. If the status is showing ‘overdue’, it means the previous Secretarial Return has not been completed. If this is the case, contact Giulia Fabbriotti.
Note:
 - Figures are entered in the box given and will then be displayed on the right-hand side of the box in a small grey circle and this shows the running total.
 - If an existing running-total figure needs to be reduced, please enter a minus number in the box.
3. There are four “Sections” called “Steps” in the online form against which data needs to be entered.

When the form initially opens the first step is “expanded” (the blue heading bar which extends across the screen). You can expand the other headings by clicking on the white “+” on the right-hand side of the heading.



4. Step 1 – Beneficiaries:

Against each **category of beneficiary**, record the **total number of beneficiaries visited in the year**, whether they are Roman Catholic (if known) and whether they are from an ethnic minority group (if known). Please don't worry if you don't complete the Catholic or Ethnic Minority fields.

-  The beneficiaries to be counted are all the people who have been visited in this return year (whether or not they have also been visited in other years).
-  Please note that people should be only counted in one category, e.g., if an elderly person usually visited at home is also visited in hospital, please only count this person as Elderly (Own Home).
-  Ethnic Minority (Cambridge Dictionary Definition: a group of people of a particular race or nationality living in a country or area where most people are from a different race or nationality).
-  A total number (in the grey circle) can be reduced by entering a negative number, e.g. -6.

Once you have filled in data against beneficiaries proceed to the next step.

5. Step 2 – Visits and Telephone Calls


This is where you can enter the data relating to any face to face visits made to beneficiaries. You should record any phone calls made to beneficiaries in this section that substituted a face to face visit.

Fields will only be displayed for beneficiary categories against which you have entered a figure in Step 1 – Beneficiaries you have helped.

6. Enter the **total number of visits made for that category of beneficiary** in the appropriate box.

- if over the 12 month period **5 Elderly (Own home) beneficiaries** were visited once a month by two Members, then the **total number of visits = 120 (5 x 12 x 2)**

- if over the 12 month period **1 Homeless beneficiary** was visited only twice throughout the year by two Members, then the **total number of visits = 4 (1 x 2 x 2)**

 People served in Soup Runs and Food Banks **should not be included** in step 2 and should be recorded in Step 3 “Material/Practical Assistance Given”.

7. Step 3 – Material/Practical Assistance Given:

Record against each pertinent category the **total number of occasions** on which Material Assistance was given by your Conference. For example, giving furniture, clothing, etc. (If money is given, the number of **occasions** should be recorded here, not the amount).

Requests that you could not honour

You can then record how many times your Conference had to turn down requests for help.

Soup Runs and Food banks

The next part deals with Soup Runs/Food banks. If your Conference runs one, record how many people were assisted, Individual servings were provided and how many hours spent. Please provide best-guess estimates where precise figures may be difficult to achieve.

8. Step 4 – SVP Events:

The final section involves recording the number and type of SVP Events attended, either face to face or virtually e.g. over Zoom. Please record the number of events the Conference attended, not the number of people attending.

9. The time spent (number of hours spent) fields should record all time by all members:

- **Conference meetings:** For a conference with 6 members meeting for 2 hours twice a month: this is 288 hours yearly (6 x 2 x 2 x 12)

- **Visiting:** Time spent with beneficiaries, including making telephone calls (1 hour spent by 2 members = 2 hours)
- **Other material/practical assistance:** for example, driving a beneficiary to church, delivering food parcels or help given filling in forms etc.

NB: DO include travel time under 'Other material / practical assistance, but not under 'Visits'

Other activities not including in the Secretarial Return form

10. Finally, you can use the text box at the end of the form to tell us about any other events or activities with which your Conference has been involved.

11. **Saving and Submitting the Form:**

Completing your return online - timeout

If no action is taken for 10 minutes, the screen will display a warning message & sign you off if no response is made any data will not be saved, so it is important that you click on the save button at regular intervals.

If you enter data into the Secretarial Return form online on a **regular basis**, you can use the **Save** button to save data entered on each occasion, and then add further data when necessary. Then at the end of the year you should follow the steps below under 'Final Submission' to submit the return and finish the process.

If you enter data into the Secretarial Return form online **at the end of the year** and all data has been entered, please follow the steps below under 'Final Submission' to submit the return and finish the process.

Final Submission

you must **Save** the data by clicking the **SAVE** button first, then go back into the form at which point you can check the entries you have made. You can then click on the **Submit** button, a box will open for you to confirm that you want to submit the form, click submit again to finally submit the return.

Final Submission – Should be done from the 1st April of each year to submit the return containing data from the previous year. NB: You have until the end of June to submit your return and finish the process.

- **SVP National Office will not receive your final figures for the year until you select Submit and finish the process.**
- **If you do not click on Save** and navigate away from the Secretarial Return page, your data will not be saved.
- If you **Save** the form on an ongoing basis, the data you enter will show in the total figures (in grey) to the right of the fields in which you enter individual figures.
- You should not use the **Submit Button** unless you have entered the final figures for the whole year.

- By pressing Submit you are committing the data entered as your final version Secretarial Return. You will not be able to edit the data entered once you click on Submit.
- Once you Submit your form, you will be asked to confirm the submission.