

“Programs” Feature Background

- Released October, 2017
- “Plug n Play” Platform Design
- Initial Implementation:
 - Holiday Program:
 - Angel Tree
 - Christmas
 - Thanksgiving
- Future Implementations (Examples):
 - Pharmacy, Backpack, Summer Lunch, Job Training, etc.

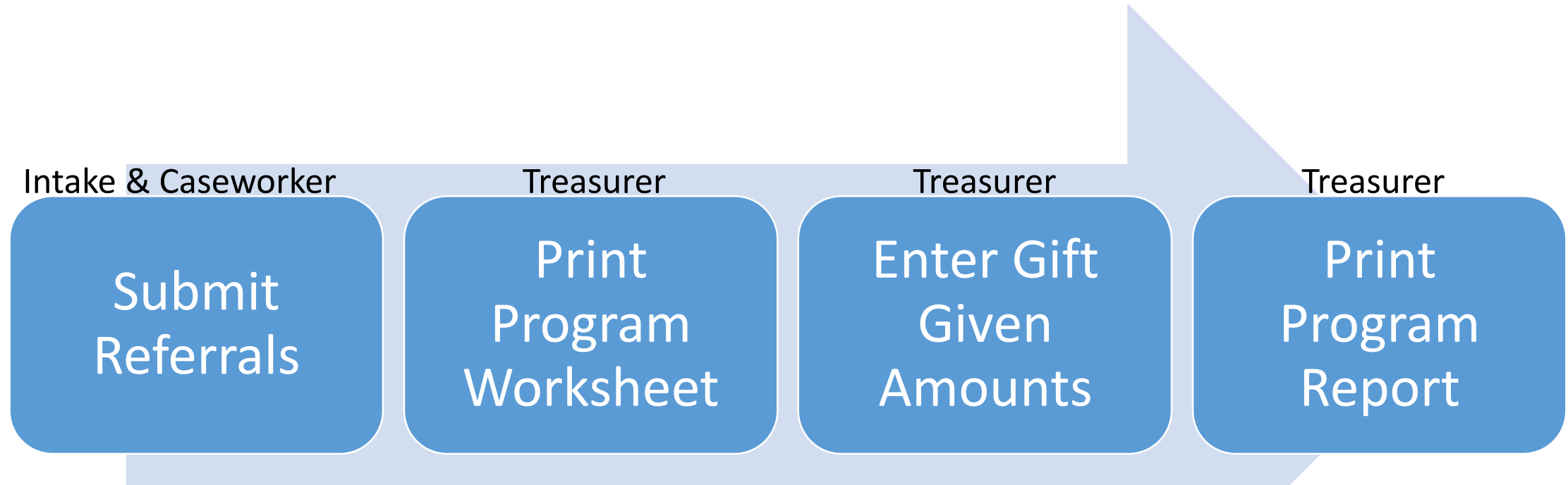
Holiday Program Training Objectives

You Will Learn How To.....

- Identify and Flag Clients and Non-Clients...***THROUGHOUT THE YEAR!***
- Create a Worksheet for The Caseworker & “Event Coordinator”
- Enter Gifts Given and NO Gifts Given Into CMS
- View Referrals and Gifts Given in Past Assistance & Reports
- Create a Final Report for Future Reference and Auditing Purposes

Holiday Programs Process & Roles

Angel Tree, Thanksgiving, and Christmas



Benefits:

1. Automates The Holiday Program Process
2. Caseworker Builds Holiday List Throughout The Year
3. Automatically Updates Client's Past Assistance & Reports
4. Provides a Report For Future Reference & Auditing Purposes

ANNUAL CONFERENCE REPORT

Fiscal Year:	10/1/2019-9/30/2020
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(Arch)Diocesan Council: SVdP GA **District Council:** 1 - Cobb County & NW Georgia

Conference Name: Holy Family, Marietta

Address: 3401 Lower Roswell Road Marietta GA 30068
Street City State Zip

Reporting Period From: 10/1/2019 to 9/30/2020 (12 Months)

Frequency Of Meetings: Weekly Every other week Monthly Other

Our Conference has formally adopted and is in compliance with the most current version of "Document 1: Bylaws for Conferences," which can be found on www.svdpusa.org. Yes X No

Treasurer's Report

(Includes Receipts and Expenses from Conference Stores and Special Works)

Last Year's Ending Balance (Required)	\$11,066.07
Adjustments to Last Period's Ending Balance - attach an explanation	
Beginning Balance (Required)	\$11,066.07

Receipts

1. Donations from Members	\$0.00		
2. Church/Poor Box Collections	\$192,606.94		
3a. Fund Raising - Special Works	\$0.00		
3b. Fund Raising - Stores	\$0.00		
3c. Fund Raising - Special Events/Other	\$0.00		
4. Other SvdP Contributions	\$3,811.86		
5a. Other - Qualified Government Grants Only	\$0.00		
5b. Other - Disaster Funds	\$0.00		
5c. Other - Capital Campaign Funds	\$0.00		
5d. Other - Other Restricted Funds	\$0.00		
5e. Other - Misc. Receipts	\$1,928.90		
Total Receipts (1 thru 5e)			+\$198,347.70

Expenses

6. Those We Serve	\$50,531.28		
7. Rent Assistance/Eviction Prevention	\$114,281.41		
8. Disaster Contributions	\$0.00		
9a. Domestic Twinning	\$2,623.00		
9b. International Twinning	\$0.00		
**Attach contact list for International Twinning Partners			
Subtotal (A) (6 thru 9b)		\$167,435.69	
10. Solidarity Contributions (Dues/Tithing)	\$16,983.85		
11. Contributions to Upper Councils	\$0.00		
12a. Operating Expense - Special Works	\$0.00		
12b. Operating Expense - Stores	\$0.00		
12c. Operating Expense - Special Events	\$0.00		
12d. Operating Expense - Other	\$678.59		
13. Other	\$2,269.15		
Subtotal (B) (10 thru 13)		\$19,931.59	
Total Expenses (Subtotal A + Subtotal B)			-\$187,367.28
Ending Balance: Beginning Balance + Total Receipts - Total Expenses			\$22,046.49

Visits and Services to People

(Includes Conference, Stores and Special Works)

	Column 1	Column 2
Person-to-Person Visits	# of Visits	# of People Helped
A. Home	5	8
B. Prison	0	0
C. Hospital	0	0
D. Elder Care	0	0
E. Other in Person	487	2022
Subtotal 1 (A thru E)	492	2030

"In Kind" Services and Goods

"In Kind" Services	# of Times	"In Kind" Value
F. Legal	0	\$0.00
G. Medical	0	\$0.00
H. Dental	0	\$0.00
I. Other	0	\$0.00
Subtotal 1 (F thru I)	0	\$0.00
"In Kind" Goods	# of Times	"In Kind" Value
J. Food	181	\$18,650.00
K. Furniture	0	\$0.00
L. Clothing	1	\$125.00
M. Other	31	\$6,045.00
Subtotal 2 (J thru M)	213	\$24,820.00

Total "In Kind" Services and Goods (F thru M)	213	\$24,820.00
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Total Hours of Service: Members	6658
Total Hours of Service: Non-Members	0
Estimated Miles in Vincentian Services	7570

Signature of Conference President

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Phone

Date

Signature of Conference Treasurer

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Phone

Date

Appendix

Membership

	Asian	Black	Caucasian	Latino	Native American	Pacific Islander	Mixed/Other	Undisclosed
Active (Full) - Under 19	0	0	0	0	0	0	0	0
Active (Full) - 19 through 39	0	1	0	0	0	0	0	0
Active (Full) - 40 and over	0	1	24	1	0	0	0	0
Total Active (Full)	0	2	24	1	0	0	0	0

Associate - Under 19	0	0	0	0	0	0	0	0
Associate - 19 through 39	0	0	0	0	0	0	0	0
Associate - 40 and over	0	2	2	0	0	0	0	0
Total Associate	0	2	2	0	0	0	0	0

Total Membership

Total Active (full)	27
Total Associate	4
Total Members	31

Comparative Membership

	Number
Total All Vincentians	31
Total - under 19	0
Total - 19 through 39	1
Total Minority (Non-Caucasian)	5
Total Non-Vincentian Volunteers	

Direct Aid

(Breaking out "Those We Serve" by Assistance Type)

6a. Burials/Funeral	\$1,000.00
6b. Education/Day Case	\$15.99
6c. Medical/Prescriptions/Counseling	\$1,622.69
6d. Clothing/Household Items	\$0.00
6e. Food/Groceries	\$13,325.00
7. Rent Assistance/Eviction Prevention	\$114,281.41
6f. Housing Miscellaneous	\$1,450.00
6g. Temporary Lodging	\$9,448.47
6h. Transportation	\$1,957.45
6i. Utilites	\$21,139.68
6j. Legal Fees/Licenses	\$0.00
6k. Recreation/Camp Fees	\$0.00
6l. Miscellaneous	\$572.00
6m. Special Works	\$0.00
Total Direct Aid (6a thru 6m - same as Line 6)	+\$164,812.69

Gifts and Vouchers

Assistance Type	# Given	# Helped	Value
Gift Card - Food	59	291	\$2,940.00
Gift Card - Gas	1	2	\$30.00
Voucher - Clothing	0	0	\$0.00
Voucher - Food	1	2	\$30.00
Voucher - Gas	28	75	\$840.00
Voucher - Household	0	0	\$0.00

Other Visits and Services Data

(Other Assistance that is not Financial or "In Kind")

Services	# of Times
N. Jobs Obtained	0
O. Referrals	0
P. Travel Aid	0
Q. Spiritual Aid/Sacraments	0
R. Other	0

Telephone Only (split from Other In-Person)	# Contacts	# Helped
S. Telephone-Only Contacts	225	502

Client Demographics

Ethnicity	Male	Female
Asian (a)	0	2
Black/African American (b/aa)	245	403
White/Caucasian (c)	27	45
Hispanic/Latino (h/l)	54	67
Alaskan/Native American Indian (ai)	0	0
Native Hawaiian/Pacific Islander (pi)	0	0
Mixed/Other	25	38
Undisclosed	0	0

Programs

Program	Referrals
Angel Tree	0
Christmas	107
Thanksgiving	91

Assistance by Zip Code

Zip Code	Unique Households	Value of In-Kind	Value of Direct Aid
30008	2	\$110.00	\$2,216.10
30031	1	\$0.00	\$396.91
30057	1	\$0.00	\$300.00
30060	1	\$0.00	\$1,325.00
30062	59	\$1,760.00	\$25,537.29
30066	1	\$0.00	\$500.00
30067	241	\$7,095.00	\$98,326.89
30068	25	\$385.00	\$15,045.79
30076	1	\$0.00	\$15.99
30080	2	\$70.00	\$2,300.00
30127	1	\$110.00	\$196.97
30327	1	\$0.00	\$872.00
30339	1	\$40.00	\$222.13
Unspecified	7	\$330.00	\$1,359.79

Hours and Miles

Details	Hours	Miles

Case - Client Visit	840.2 Hours	1740 Miles
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Hours and Miles (Continued)

Details	Hours	Miles
Case Administration	1230 Hours	625 Miles
Christmas Program	166 Hours	290 Miles
Collecting Donations	48 Hours	60 Miles
Conference Meetings	594 Hours	1580 Miles
Correspondence	170 Hours	0 Miles
Counting Collections	48 Hours	240 Miles
Data Entry	1370 Hours	1170 Miles
District Meetings	8 Hours	25 Miles
Food Pantry	160.9 Hours	565 Miles
Help Line	500 Hours	390 Miles
Member Training	122 Hours	145 Miles
Office Work	500 Hours	390 Miles
Secretary Duties	82 Hours	60 Miles
Spiritual Advisor Meditation Prep	48 Hours	60 Miles
Thanksgiving Program	65 Hours	100 Miles
Treasurer Duties	706 Hours	130 Miles

Holy Family Holiday Programs “Case Study”

Angel Tree, Thanksgiving, and Christmas

Introduction

The Holiday Program feature was included in release 3.0 in October 2017 with the intention of automating the Holiday Program process. The intent of this “Case Study” is to share the Holiday Program process, that Holy Family has been using for 2 years, so you can consider using it as a model and modifying it to the way your conference handles Holiday Programs.

Benefits:

After 2 years, we have found the following 3 benefits:

- (1) The Caseworker refers their clients to the Holiday Program throughout the year rather than trying to remember which clients should be referred to the program right before the start of the event
- (2) CMS automatically updates both client’s past assistance program history and the Annual Report In-Kind Goods and Services
- (3) Provides a Program Report of all gifts given and not given for auditing purposes

Hopefully, this “Case Study” has been helpful; and as always, if you have any questions, please submit a General Question from the CMS Portal.

Thank you, John

Clients and Non-Clients:

- a. From the end of the prior program, to the cut-off date of the current program (i.e. Christmas Program: 12/26/2019-12/10/2020), the **Case Intake Person and Caseworkers** submit client referrals to any, or all, of the Holiday Programs, by clicking the “Vincentian Programs” button during Case Intake (after advancing to the “Request Details” tab and Caseworker entry (after advancing to the “Assistance” tab)
 - i. For non-clients, or clients with closed cases, you can enter them into Case Intake and after you have referred them to the HP, you can click the “Cancel” button and the referral will be submitted and the inquiry will be deleted.
 - ii. Another approach for closed cases is to “Reopen” the case; tab back to the “Assistance” tab; click the “Restart” button and then click the “Vincentian Programs” button.
- b. Sometime before the event (10-15 days), and all client referrals have been submitted, the **Treasurer** downloads and prints the “Holiday Program Worksheet” and distributes to the Caseworkers a customized Excel worksheet listing with their client’s contact and household member’s information.

- c. **Caseworker** calls their clients and confirms that they will attend the event and “withdraws” the ones, from the program, that will not be attending the event going to search>clients>past assistance
- d. After the event, the **Caseworker** provides the Treasurer with an updated client worksheet indicating the value of the gift given or that no gift was given for each client
- e. The **Treasurer** reviews each client by going to task pane>programs>holiday programs>select holiday program then clicks of each client and completes the form by selecting the resource and entering the value of the gift given.
- f. After the form has been completed, the **Treasurer** clicks either “Gift Given” or “No Gift” buttons. This updates the client’s past assistance>program history, the annual report (In-Kind>number of people helped and value), and the Holiday Program>” Program Report”.
- g. Finally, the **Treasurer** previews, downloads, and prints the “Program Report” and retains it for audit purpose.

***NOTE** - Treasure is defined as anyone who has been assigned a Treasurer’s role