

Finger Lakes/Southern Tier VOAD

January 19, 2017

Meeting Notes: Fiscal Agent Role & Criteria

Laura reviewed the responsibility of Catholic Charities as fiscal agent. They are to:

- Receive the funds.
- Ensure appropriate systems are in place to receive record, deposit and dispense the funds.
- Distribute monies in accordance with pre-established policies and or restrictions.
- Acknowledge contributions through receipt.
- Be publicly accountable and independently audited.
- Hold donation records for seven years.
- Provide all administrative services at no cost.

Laura informed the group that Catholic Charities of Steuben can fulfill those responsibilities.

Laura explained that she and her team met (internally within Catholic Charities) to discuss how they would approach this responsibility. The team included Lynda Lowin, Director of Turning Point services; Paula Smith, Director of Development and Communications and Lois Pruden, Senior Accountant, and Laura.

Laura reported that her team has completed the fund and gift subtype codes within Raiser's Edge financial system. They also developed an expense category for web invoicing; to select for disaster expenses at the point we need to utilize contributions. In Financial Edge we have set up the cost center with a number associated to hold contributions and have established a reserve cost code to cover disaster case management expenses.

Discussion followed related to case management work under Catholic Charities. Laura noted that Catholic Charities USA is a resource for Catholic Charities to apply for in order to receive funds for long-term case management services. She believes these funds are through FEMA. Laura questioned how services would be coordinated. Tim Marshall, Steuben County Emergency Services, told the group a VOAD meeting would be called, at the time of an incident, to determine coordination needed.

Catholic Charities development staff would like to develop a webpage, in advance of a disaster, that could be launched within 24 hours. Laura had questions for the group in terms of whether they would like to have a logo listed on the page along with partner agencies. Following discussion, it was decided that CC will develop a web page with the national VOAD logo. The page will state that Catholic Charities is functioning as a service provider of the local VOAD aiding disaster relief services. It was suggested that they type of services CC would provide, also be listed. There will be a donate button associated with this page. Laura will also provide a 2-1-1 link to 2-1-1 Disaster Assistance Guide. Carol Wood (IHS) offered that 2-1-1 would be available for examples of other places to donate or to learn how to volunteer. The rack card idea was tabled. Laura agreed to bring a markup of this web page to the next meeting for preapproval of the committee.



Laura also offered that her development staff is willing to develop a rack card or flyer which could be available as a handout within communities experiencing a disaster. Carol suggested that type of coordination may also be done through 2-1-1.