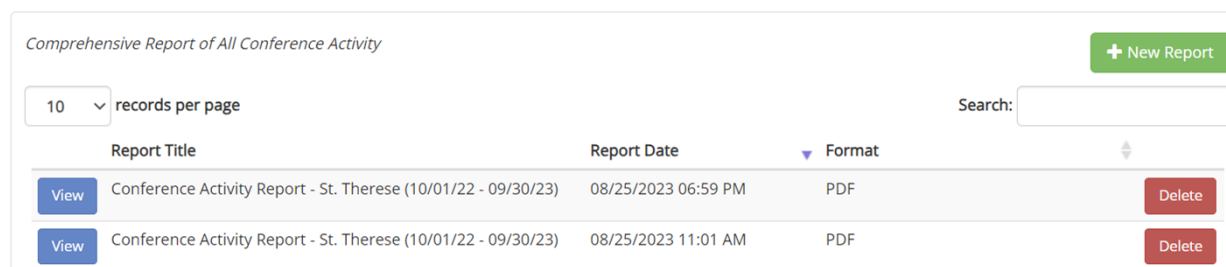


**St. Vincent de Paul Society of Milwaukee**  
***Using ServWare to Develop the Annual Report***

**ServWare Can Generate a Conference Activity Report (CAR) to Support the Annual Report.**

ServWare can now generate what is called the Conference Activity Report (CAR). The Conference Activity Report is available in ServWare at Reports >> Conference Activity Report.

Conference Activity Report



Comprehensive Report of All Conference Activity

10 records per page

Search:

	Report Title	Report Date	Format	
<a href="#">View</a>	Conference Activity Report - St. Therese (10/01/22 - 09/30/23)	08/25/2023 06:59 PM	PDF	<a href="#">Delete</a>
<a href="#">View</a>	Conference Activity Report - St. Therese (10/01/22 - 09/30/23)	08/25/2023 11:01 AM	PDF	<a href="#">Delete</a>

The goal of the CAR report is to provide all or at least much of the needed data for the Annual Report. ServWare allows you to run the CAR report multiple times and to save the results of each run.


If some of the data required by the Annual Report has not been entered into ServWare by your conference this is not a problem. The CAR report is still valuable—whatever data the CAR provides can still be used to support parts of the annual report.

For example, much of the financial data on the CAR report is taken from the ServWare Finance Functions, which some conferences have chosen not to use. However, these conferences can still use the remaining data from the CAR report. What might be especially valuable is the total dollar figure of “Those We Serve,” which is a total of all assistance provided during the year. This figure draws from ServWare assistance data, which is separate from the Financial Functions.

However, conferences need to take care that the data in the CAR report is accurate. And the use of the report requires a sense of what data the conference is and possibly is not entering.

## ServWare Provides the “SVdP National Conference Activity Report Guidelines” Document

ServWare provides a ten-page document on the CAR report, the “SVdP National Conference Activity Report Guidelines.” This document is available in ServWare at View >> Files >> Servware >> “ServWare SvDP Conference Annual Report.”

	<a href="mailto:info@servware.org">info@servware.org</a>
<h3>SVdP National Conference Activity Report Guidelines</h3>	
<p>ServWare provides the ability to generate a Conference report representing the National Society of St. Vincent de Paul report requirements for conferences. This report is based on the Consolidated Report of the Conferences section of the Archdiocesan Council Annual Report form.</p>	
<p>This document describes the sections of the report along with the ServWare configuration and data entry requirements to accurately generate the data.</p>	
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Let's consider how the CAR report can help provide the needed data for each section of the annual report.

## 1. Membership Section

The Membership section of the CAR report presents data on members.

Membership									
(*Ethnic breakdown required for government reporting, grant applications, etc. Please assign each member to one category only.)									
Age Range	Unassigned	Asian	Black	Caucasian	Hispanic Latino	Alaskan Native / American Indian	Native Hawaiian / Other Pacific Islander	Mixed / Other	
Member Type      Active (Full)									
Unassigned	17	0	0	0	0	0	0	0	0
71 and over	0	0	0	1	0	0	0	0	0
40 and over (pre 2023)	0	0	0	1	0	0	0	0	0
Member Type      Associate									
Unassigned	5	0	0	3	0	0	0	0	0
Total Members									
Member Type					Number				
Active					19				
Associate					8				
					Total Members				
					27				

### Member Age Range Possibilities Have Changed

SVdP National has updated the Conference member age range possibilities for the 2023 annual report. The new ranges have been incorporated into the CAR report.

Comparative Memberships	
Comparative Membership	Number
Total - All-Vincentians	27
Total - Under 19 (Youth)	0
Total - 19 through 29 (Young Adult)	0
Total - 30 through 39	0
Total - Minority (Non-Caucasian)	0
Total - Non-Vincentian Volunteers	0

Information for each conference member should be updated in ServWare at the Admin >> Conference Members page so each active member is assigned a valid membership range using

the new options. Both the new and old ranges are available on the Membership tab when editing a Conference Member entry. The ranges that are no longer valid have '(pre 2023)' displayed.

## 2A. Treasurer's Report - Balance Report and Receipts

The Treasurer's Report Balance Report and Receipts in the CAR report are calculated from the data in the ServWare Financial Functions. These CAR sections will show blanks for conferences that do not use the Financial Functions.

Treasurer's Report		
Balance Report		
	Beginning Balance	Ending Balance
Old National Bank	\$ 2,001.29	
Receipts		
	Amount	
Donations from Members		
Church/Poor Box Collections	\$ 20,672.82	
Fund Raising - Special Works		
Fund Raising - Stores		
Fund Raising - Special Events/Other		
Other SVdP Contributions	\$ 27,300.00	
Other - Qualified Government Grants		

When an account is added or edited from the Finance >> Accounts page there is a National Report Account checkbox that must be checked for the account's information to be used for the report.

## 2B. Treasurer's Report – Expenses and Especially “Those We Serve” Total

The Expenses section of the CAR provides totals of expenses across that year for those using the Financial Functions.

Most and possibly all expenses on behalf of neighbors are consolidated in the “Those We Serve” category. *Note that this total is an exception to the rule, and it will be shown even if the conference does not use the ServWare Financial Functions.* This total is calculated using the assistance amounts related to each request.

Expenses	
	Amount
Those We Serve	\$ 92,463.72
Disaster Contributions	
Domestic Twinning	
International Twinning**	
Solidarity Contributions (Dues/Tithing)	
Contributions to Upper Councils	
Operating Expense - Special Works	
Operating Expense - Stores	
Operating Expense - Special Events	
Operating Expense - Other	
Other	
Housing Assistance/Eviction Prevention	
Total	\$ 92,463.72

### Assistance Types Must Have a National Report Category

But to make the Those We Serve total accurate, each of the Conference Assistance Types must have a “National Rpt. Catg” associated with it. This category will typically be “Those We Serve.” And so, all assistance with any type associated with Those We Serve will be totaled on the Those We Serve line of the CAR report.

#### Edit Assistance Type

*Name	beds
National Rpt Catg	Expenses - Those We Serve
Description	-- Select -- Expenses - Domestic Twinning Expenses - Housing Assistance/Eviction Prevention Expenses - Operating Expense - Special Works Expenses - Those We Serve
Abbreviation	

## The CAR Report Uses Assistance “Date Provided” for Inclusion in the Year

The assistance items included in the CAR Report “Those We Serve” total will be those with an assistance “Date Provided” in the date range requested for the report.

## There Is a Danger of Double Counting Expenditures on the CAR

If a conference uses the ServWare financial functions to enter expenditures other than the direct value of assistance there is a danger of double counting expenditures for the CAR.

For example, you do not want your purchase of the batch of gift cards plus the issuance of the individual gift cards to both show up in the CAR.

## 3. Visits and Services to People

### The Visits Section Provides Data on Visit Counts and People Helped

The Person-to-Person Visits Report section of the CAR report provides data on the number of visits and the number of people helped, by type of visit.

Person-to-Person Visits Report		
Person-to-Person Visits	# of Visits	# People Helped
Home	217	604
Other	54	143
Telephone	3	7
	274	754

The visit type can be specified in ServWare by checking the appropriate Visit Details checkbox.

These conditions must be met for a visit to be counted:

- A visit type must be checked on the assistance request. Multiple visit types can be checked.
- The Visit Complete checkbox must be checked.
- Visit scheduled date must fall within the report date range or request date must fall within the range.”

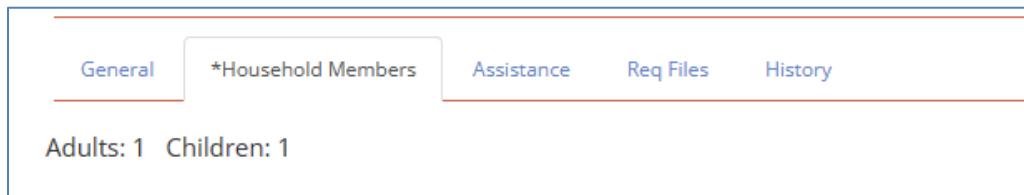
Visit Details		Assigned (1)	
Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Other	<input type="checkbox"/>	<input type="checkbox"/>	
Eldercare	<input type="checkbox"/>	<input type="checkbox"/>	
Hospital	<input type="checkbox"/>	<input type="checkbox"/>	
Prison	<input type="checkbox"/>	<input type="checkbox"/>	

<input checked="" type="checkbox"/> Visit Complete?	Simpson, Carole
Scheduled Date	Time
05/09/2023	01:00 PM
People Helped Override ⓘ	3

The # People Helped in the CAR report will be taken from the counts on the Household Members tab, unless the People Helped Override is checked. Note that when the Override is checked all household members are counted as adults.

When entering requests, Council staff and most conferences do not enter names of Household Members other than the head of the household (or “& Joe Smith” for multiple heads).



The screenshot shows a web interface with a tab labeled '\*Household Members'. Below the tab, it displays 'Adults: 1' and 'Children: 1'. Other tabs visible are 'General', 'Assistance', 'Req Files', and 'History'.

When entering a neighbor, you might not enter either names or counts of Household Members. But if not, the CAR assumes a count of one for the household.

You can quickly identify requests in which either the Home Visit box is not checked and/or the Visit Complete box is not checked by using the Activity Detail Report and the “HV” and “OV” columns.

In the example below, the HV box is checked for the first neighbor. The HV box is not checked for the second neighbor, although the OV (other) box is.

Req Date	Status	Name	Assigned	N/R	Ppl	HV	OV
05/04/2023	Compl	Wilson, Ashley	Ai W	1	2	1	
05/17/2023	Compl	Wainwright, Tamanela	Ki	1	3		1

So, using this report is a good way to find visits that possibly do not have a visit type (e.g., “Home”) selected and the Visit Complete box checked, rather than pulling up each request.

To make the review of those without Visit Complete and/or without a type checked we can also export the report into a spreadsheet and sort it by HV and OV.

#### 4. "In Kind" Services and Goods Section

The annual report asks for summaries on four types of in-kind assistance, and the CAR report tabulates these counts and values.

##### In Kind Goods And Services Provided (Non-Cash Contributions)

Description	# of Times	Value
Goods		
Furniture	4	\$ 368.00
Other (Goods)	188	\$ 7,273.25
Food	2	\$ 45.00
Sub-Total	194	\$ 7,686.25
Total In-Kind	194	\$ 7,686.25

#### 5. Hours and Mileage In-Service

The CAR report will calculate your hours and mileage.

##### Hours and Mileage Report

Total Hours of Service: Members	434.35
Estimated Miles in Service	2,571.50

Miles and hours can be entered in Servware at the Mi/Hrs tab. Visitors may also enter miles and hours on the ServWare Request screen, although only for Visitor 1, and only this data is picked up on the reports. (You must also enter a visit date).

Miles and hours data can be viewed through the ServWare reports at Reports >> Mileage and Hours in Service.

#### Let Us Help

Thanks to all who participated in our July 26, 2023 workshop for helping to develop this advice. We are always eager to help conferences on a one-on-one or small group basis with their use of ServWare, for developing the annual report or other reasons. For help with ServWare please contact Maria Welz.

