**Visits and Service to People**

**Help with Page Two of the Quarterly and Annual Reports**

The Conferences have experienced some confusion when reporting on page 2 of the Quarterly and Annual Reports. The National has made some changes on the form to try to clarify the way we report In-Kind transactions. A copy of the final 2018 Annual Report form and explanations is enclosed. They have changed the form from # of Visits to # of Times in the In-Kind section.

It states: “In-Kind” refers to non-cash contributions: anything (food, furniture, clothing, services, other) that the Conferences receive at no cost and pass on directly to a family or individual or use internally by and for the Conference. In-Kind should reflect only what was donated-not what was purchased. Enter the number of times the service or goods was offered and the value of those services or goods.

In column 2 of the Visits and Services to People section it states “(includes In-Kind).” That number includes all of the people who benefited from the service provided. In the “In Kind” section, the space entitled # of Times = the number of families helped, not the total visits or families helped. So the # of Visits would be the number of times a help or services offered. Most of the In-Kind services are going to be reported in section E – Other In-Person Visits because they usually are away from the client’s home.

**1. Example of Visit Reporting:**

A normal home visit is made to a family of 2 parents and 3 children.

**To report:**

**A. Home Visits**

# of Visits: 1. # of People Helped: 5.

Continue in this fashion for each category of Home, Prison, Hospital, Eldercare and Other In-Person.

2. **Example of In-Kind Transactions:**

You are assembling and delivering boxes of food at Thanksgiving. Boxes contain:

* Food (donated by parishioners; average $62/box)
* Gift card (donated by parishioners; $25 each)
* Box (paid by Conference; $5 each)

These boxes will be delivered to 31 families (totaling 152 persons).

**To Report**:

**Person-to-Person Visits**

**A. Home Visits**

# of Visits: 31. # of People Helped: 152.

**“In-Kind” Services**

**J. – Food**

# of Times: 31. “In Kind” Value: $2,697 [This represents donations of food + card x 31]

**6 – Those We Serve**

$155 [this represents the cost of 31 boxes, purchased by Conference]

**3. Example of Food Pantry Recording:**

You run a food pantry and 101 families are in line.

The Conference paid $500 for food; two grocery stores donated $898 worth of food.

Determine the number of people in each family and keep a record showing:

* Family name
* Number of people in family
* Date of visit to pantry

At the end of the distribution, add the number of families served and the number in each family.

**To Report:**

**E. Other In-Person Visits**

# of Visits: 101. # of People Helped: 527.

**6 – Those We Serve**

$500 [this represents Conference-purchased food]

**J. Food**

# of Times: 101. “In-Kind” Value: $898 [grocery store donations]

**4. Example of In-Kind Services:**

A client needs help to repair his auto.

A repair shop offers to donate labor ($367) for the job. The Conference will pay for the parts, which cost $255.67. The clients, a family of 3, meet you at the auto repair shop.

**To Report:**

**E. Other In-Person Visits**

# of Visits:1. # of People Helped: 3.

**6 – Those We Serve**

$255.67 [this represents the Conference payment]

**M. Other**

# of Times: 1. “In-Kind” Value: $367 [donated labor]

* Remember:
* In the Person-to-Person Visits section, the # of Visits column is the number of times you visited a client in category A through E.
* In the # of People Helped column, you should show the number of people in the family that benefited from your visit. This number would include all total number of visits, including any “In-Kind.” The “In-Kind” would add in the number of people helped. That is why it is essential for Conferences that have a pantry to maintain records that show how many members are in each family they serve.

The “In-Kind” Services and Goods section is divided into “In-Kind Services – F through I and “In-Kind” Goods – J through M.

* The # of Times is the **number of visits**.
* The “In-Kind’ Value is the **amount donated**. The Conference portion is expensed.

How to log home visits by telephone during pandemic

* **Q: During this Coronavirus pandemic when we are not doing any Home Visits with our friends in need, how do we keep track of our phone interviews? Where should we enter the hours we spend and the number of people we help over the phone, when it is a referral, counseling, or sometimes we are paying a bill?**
* **A:** Phone interviews in place of Home Visits are now being done across the country due to the Coronavirus and should be reported in the same manner as you would a Home Visit, except phone interviews should be entered under Other In-Person Visits on the Conference annual report**.**