

Transitions Retreat and Board Meeting Agenda
Tuesday, August 23, 2022
Union County Government Center
155 N. 15th Street
Lewisburg, PA 17837

Retreat

4:30 - Simple Appetizers and Socialize

5:00 - Dinner

6:00 - "The Board: From Good to Great!"

Jay Lemons

7:30 - Dessert

7:45 - Board Meeting

Board Meeting Agenda

Call to Order

President, D. Toni Byrd

Roll Call

Secretary, Chris Dotterer

Secretary's Report

Secretary, Chris Dotterer

Approval of Minutes

Treasurer's Report

Treasurer, Ed Sigl

Finance Director, Janet McGrath

CEO/Agency Reports

CEO, Mae-Ling Kranz

Committee Reports

Auction

Sheri Rippon

Public Relations and Development

Marsha Lemons

Finance

Ed Sigl/Janet McGrath

Governance

Mary Louise Schweikert

Personnel

Helen Nunn

New Business

Toni Byrd

Reminders:

- Staff Meeting Participation by Board – 1st Friday at 12:30 PM. Contact Heather Over to join.
- Staff In-Service 3rd Friday at 12:30 PM - Board welcome to participate. Contact Heather Over to join.
- Next Meeting Date – September 27, 2022
- Committee Reports Due - Tuesday, September 20, 2022, at Noon

Executive Session

Adjournment



Transitions Board of Directors Minutes

Remote Meeting held via Zoom

June 28, 2022

MINUTES COMPILED AND SUBMITTED BY: Tracy Strosser, Administrative Support Assistant
Reviewed by Secretary, Christine Dotterer

NOTE: All attachments and reports are on file with the Secretary

ATTENDANCE: P = PRESENT IN PERSON C = ON CONFERENCE CALL A = ABSENT L = ON LEAVE

	BOARD MEMBER		BOARD MEMBER		BOARD MEMBER
P	D. Toni Byrd, President	P	Amanda Gaynor	A	Stacey Pearson Wharton
A	Helen Nunn, Vice President	P	Amy Gronlund		
P	Ed Sigl, Treasurer	P	Sabra Karr		
P	Christine Dotterer, Secretary	A	Marsha Lemons		
P	Mae-Ling Kranz, CEO	A	Tamara Normington		
P	Kendra Aucker	P	Stacy Richards		
A	Jeremy Cook	A	Sheri Rippon		
A	Robert Cook	P	Mary Louise Schweikert		

STAFF PRESENT: Jan McGrath, and Tracy Strosser

Transitions Board of Directors Meeting Minutes

Remote Meeting held via Zoom

AGENDA ITEM/SUBJECT	DISCUSSION SUMMARY	ACTION AND REQUIRED FOLLOW-UP
CALL TO ORDER (D. Toni Byrd)	The Meeting was called to order at 7:01 pm by Board President D. Toni Byrd.	
ROLL CALL	Roll call was taken by Board Secretary Christine Dotterer.	
SECRETARY’S REPORT (Christine Dotterer) Approval of Minutes from 05/24/22	Minutes were previously distributed. No additions or corrections were noted.	Motion by Kendra Aucker: To accept the Minutes of May 24, 2022, Board Meeting as presented. <u>Seconded by Amanda Gaynor.</u> <u>Abstention by Stacy Richards.</u> <u>Motion carried.</u>
TREASURER’S REPORT (Ed Sigl and Jan McGrath) Approval of Variance Reports	Ed and Jan Presented a Variance Dashboard PowerPoint. The summary is intended to provide an abridged overview of the agency’s finances. The Financial Summary contained the following slides: <ul style="list-style-type: none"> • Key Takeaways <ul style="list-style-type: none"> ○ Salary & Expenses numbers for May are representative of the entire year. ○ Cash was up for May. ○ Cash is up and receivables are down which is what we like to see with this organization. • Total Assets <ul style="list-style-type: none"> ○ May is very consistent on the balance sheet. 	

	<ul style="list-style-type: none"> • Budget vs. Actual (Month and Year) <ul style="list-style-type: none"> ○ These numbers are consistent with year-to-date numbers. • Revenue vs. Expenses (Actual) <ul style="list-style-type: none"> ○ Expenses are slightly greater than income for May but not far off, this is typical for several years. <p>The Variance dashboard was previously distributed to the Board.</p>	
CEO/AGENCY REPORTS (Mae-Ling Kranz)	<p>CEO and Agency reports for May 2022 were previously distributed to the Board. Mae-Ling highlighted:</p> <ul style="list-style-type: none"> • We have been busy focusing on the auction, which went well. • There have been some major staff changes including Tara Day Ulrich leaving and Jamie Grobes and Shannon Fisher being promoted to Programs Directors. We continue to work on filling positions. • Counseling referrals have slowed down a bit. Mae-Ling discussed the supervisor's report and explained agency referrals and services. • NCSH was closed for a bit for sewer pipe repairs, but we are now back up and running. • Mae-Ling shared; that the new team members are doing a fantastic job. Education is being proactive and holding a lot of summer camps. 	<p>Members should read Mae-Ling's and the other staff's reports and contact Mae-Ling with any questions.</p>

STANDING COMMITTEE REPORTS		
Auction (Mae-Ling)	<p>Mae-Ling gave an overview of the event.</p> <ul style="list-style-type: none"> • It was our best Auction so far. • We met our goal of over \$50,000 in sponsorships and netted over \$100,000 for the event. 	
Development and Public Relations (Marsha Lemons)	No report was submitted.	
Finance (Ed Sigl/Janet McGrath)	<p>Ed and Jan Shared the FY22-23 Budget.</p> <ul style="list-style-type: none"> • The biggest change for the new budget is pulling expenses from the operations budget and putting them into salary and benefits. • If we have another year like this year with fundraising, then we will be in good shape. • We have budgeted moderately to be safe. 	<p><u>Motion by Chris Dotterer:</u> To accept the FY22-23 Budget, as presented. <u>Seconded by Kendra Aucker.</u> <u>Motion carried.</u></p>
Governance (Mary Louise Schweikert for Marsha Lemons)	<p>Mary Louise reviewed the officers and additions to the Board of Directors for the FY22-23.</p> <ul style="list-style-type: none"> • Mary Louise requested a vote for the Officers: President - Toni Byrd, Vice President - Helen Nunn, Treasure - Ed Sigl, and Secretary - Chris Dotterer for the term of 7/1/2022 – 6/30/2023. • Mary Louise requested a vote for new Board Members with an Anniversary date of 7/1/2022: Angie Brouse, Tony Butto, Nancy Hartman, and Lindsay Higgins. • Mentors for the new Board Members were assigned: Kendra Aucker, mentor to Angie Brouse, Mary Louise Schweikert, 	<p><u>Motion by Mary Louise Schweikert:</u> To accept the Officers of the Board of Directors, as presented. <u>Seconded by Stacy Richards.</u> <u>Motion carried.</u></p> <p><u>Motion by Mary Louise Schweikert:</u> To accept new Board Members, as presented. <u>Seconded by Chris Dotterer.</u> <u>Motion carried.</u></p>

	<p>mentor to Nancy Hartman, Stacy Richards, mentor to Lindsay Higgins, and Chris Dotterer, mentor to Tony Butto.</p> <p>There was a discussion about the Strategic plan.</p> <ul style="list-style-type: none"> • This is a living document that we revisit, amend, and move forward with. • In the past, we have not been so specific with our plans. • Mae-Ling shared the process of writing the plan with staff input without getting too specific with details because things change. • Kendra added that we need to focus on the mission and not stretch ourselves too thin. Being financially viable long term. • Kendra asked for a review in the next 6 months with a focus on prioritizing programs, services, and strategies. 	<p><u>Motion by Kendra Aucker:</u> To adopt the Strategic Plan for 7/1/2022 – 6/30/2025 with review in the next 6 months. <u>Seconded by Mary Louise Schweikert.</u> <u>Motion carried.</u></p>
<p>STAFF MEETINGS PARTICIPATION BY THE BOARD (D. Toni Byrd)</p> <p>EXECUTIVE SESSION (D. Toni Byrd)</p>	<p>Staff meetings are held on the 2nd Friday of each month at 12:30 pm. Staff In-Service will be the 4th Friday of the month at 12:30 pm for Education. Board members interested in attending, please get in touch with Heather Over, who is facilitating the virtual meetings.</p> <p>Staff was excused from the Meeting, and the Board adjourned into the Executive session at 7:59 pm.</p>	<p><u>Motion by Amy Gronlund:</u> To adjourn into Executive Session. <u>Seconded by Amanda Gaynor.</u> <u>Motion carried.</u></p> <p><u>Motion by Amy Gronlund:</u> To adjourn into Regular Session. <u>Seconded by Amanda Gaynor.</u> <u>Motion carried.</u></p>

		The regular meeting of the Board resumed at 8:01 pm.
NEXT MEETING DATE (D. Toni Byrd)	The next meeting date is Tuesday, August 23, 2022, at 5:00 pm, held at the Union County Government Center is the Board Retreat.	Staff and Committee reports are due Tuesday, August 16, 2022 , at noon.
ADJOURNMENT	The Meeting was adjourned at 8:02 pm.	



JUNE 2022

VARIANCE DASHBOARD

A VISUAL SUMMARY OF MONTH END FINANCIALS

KEY TAKEAWAYS

Overall, June financials finished out the fiscal year with a positive performance. Transitions remains financially sound and showed a solid fiscal year.

1

Salary/Benefits Expenses

Salary expenses are at 91% of the budget for the fiscal year. Benefits are still down at 70% of the budget.

The Year To-Date

Fundraising and contributions reached \$358,789 for the fiscal year. This was 80% over budget.

Total Income came in at 92% of total budgeted income.

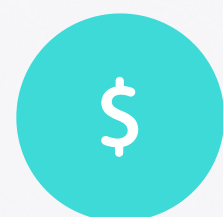
Transitions showed a net income for FY 21 - 22 of \$62,512.

2

Accounts Receivable

Our A/R performs consistently across the board. Grant funds continue to be received, decreasing A/R and increasing cash.

3



TOTAL ASSETS



As of June 30, 2022

Balance Sheet Prev Year Comparison

As of June 30, 2022

	<u>Jun 30, 22</u>	<u>Jun 30, 21</u>	<u>\$ Change</u>	<u>% Change</u>
ASSETS				
Current Assets				
Checking/Savings				
Total Checking/Savings	663,982.35	485,753.31	178,229.04	36.69%
Total Accounts Receivable	654,228.81	782,475.62	-128,246.81	-16.39%
Total Other Current Assets	49,594.26	41,595.73	7,998.53	19.23%
Total Current Assets	1,367,805.42	1,309,824.66	57,980.76	4.43%
Fixed Assets				
Total 1600 · Property, Plant & Equipment	825,215.82	825,215.82	0.00	0.0%
Total Fixed Assets	598,407.47	622,859.39	-24,451.92	-3.93%
Other Assets				
1500 · Vanguard Brokerage	583,982.53	642,191.86	-58,209.33	-9.06%
Total Other Assets	583,982.53	642,191.86	-58,209.33	-9.06%

BUDGET VS ACTUAL

1 MONTH ENDED 06/30/2022

VARIANCE ANALYSIS MONTH OF JUNE 2022

Profit & Loss Budget vs. Actual

1 month ended June 30, 2022

	Jun 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Total Income	374,308.99	266,955.00	107,353.99	140.21%
Gross Profit	374,308.99	266,955.00	107,353.99	140.21%
Expense				
6560 · Salaries and Wages	187,661.19	129,227.00	58,434.19	145.22%
Total 7010 · Employee Benefits	45,332.23	52,187.00	-6,854.77	86.87%
Total 7100 · Program Services	35,385.52	12,276.00	23,109.52	288.25%
Total 7200 · Program Expenses-Other	27,502.63	14,039.00	13,463.63	195.9%
Total 7300 · Travel & meetings expense	4,937.33	5,209.00	-271.67	94.79%
Total 7700 · Program Expenses-occupan	21,740.10	39,795.00	-18,054.90	54.63%
8200 · PCADV Relocation	2,541.33	1,218.00	1,323.33	208.65%
Total 8500 · Misc expenses	2,135.34	1,338.00	797.34	159.59%
Total 8700 · Passthrough Expenses	1,588.16	10,416.00	-8,827.84	15.25%
8900 · Fundraising Expenses	25,224.85	1,250.00	23,974.85	2,017.99%
Total Expense	354,048.68	266,955.00	87,093.68	132.63%
Net Ordinary Income	20,260.31	0.00	20,260.31	100.0%

BUDGET VS ACTUAL

VARIANCE ANALYSIS FISCAL YEAR 2021-2022

12 months ended 06/30/2022

	TOTAL			
	Jul '21 - Jun 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Total Income	2,964,524.27	3,223,426.00	-258,901.73	91.97%
Gross Profit	2,964,524.27	3,223,426.00	-258,901.73	91.97%
Expense				
6560 · Salaries and Wages	1,409,600.99	1,550,718.00	-141,117.01	90.9%
Total 7010 · Employee Benefits	440,848.75	626,246.00	-185,397.25	70.4%
Total 7100 · Program Services	269,784.61	147,264.00	122,520.61	183.2%
Total 7200 · Program Expenses-Other	296,201.72	168,500.00	127,701.72	175.79%
Total 7300 · Travel & meetings expense:	46,443.18	62,500.00	-16,056.82	74.31%
Total 7700 · Program Expenses-occupan	262,202.16	477,522.00	-215,319.84	54.91%
8200 · PCADV Relocation	17,477.00	14,627.00	2,850.00	119.49%
Total 8500 · Misc expenses	42,960.77	16,049.00	26,911.77	267.69%
Total 8700 · Passthrough Expenses	86,715.09	125,000.00	-38,284.91	69.37%
8900 · Fundraising Expenses	29,777.93	15,000.00	14,777.93	198.52%
Total Expense	2,902,012.20	3,203,426.00	-301,413.80	90.59%
Net Ordinary Income	62,512.07	20,000.00	42,512.07	312.56%

BALANCE SHEET

Previous YR
Comparison



As of June 30, 2022

	<u>Jun 30, 22</u>	<u>Jun 30, 21</u>	<u>\$ Change</u>	<u>% Change</u>
ASSETS				
Current Assets				
Checking/Savings				
1011 · M&T Bank - Checking	43,693.73	100,425.71	-56,731.98	-56.49%
1013 · M&T Capital Campaign	50,540.35	50,535.29	5.06	0.01%
1014 · M&T - Savings Account	450,050.29	215,085.06	234,965.23	109.24%
1015 · BB&T - Savings Acc	96,814.70	96,805.02	9.68	0.01%
1017 · M&T - Shamokin Capital Campaign	21,985.11	22,009.11	-24.00	-0.11%
1018 · First National Bank	0.00	-5.05	5.05	100.0%
1040 · Petty Cash	898.17	898.17	0.00	0.0%
Total Checking/Savings	<u>663,982.35</u>	<u>485,753.31</u>	<u>178,229.04</u>	<u>36.69%</u>
Accounts Receivable				
1110 · Accounts Receivable	654,228.81	782,475.62	-128,246.81	-16.39%
Total Accounts Receivable	<u>654,228.81</u>	<u>782,475.62</u>	<u>-128,246.81</u>	<u>-16.39%</u>
Other Current Assets				
Account for Credit Transfer	177.26	176.26	1.00	0.57%
1450 · Prepaid Expenses	48,877.00	40,879.47	7,997.53	19.56%
1460 · Security Deposits	540.00	540.00	0.00	0.0%
Total Other Current Assets	<u>49,594.26</u>	<u>41,595.73</u>	<u>7,998.53</u>	<u>19.23%</u>
Total Current Assets	<u>1,367,805.42</u>	<u>1,309,824.66</u>	<u>57,980.76</u>	<u>4.43%</u>
Fixed Assets				
Total Fixed Assets	<u>598,407.47</u>	<u>622,859.39</u>	<u>-24,451.92</u>	<u>-3.93%</u>
Total Other Assets	<u>583,982.53</u>	<u>642,191.86</u>	<u>-58,209.33</u>	<u>-9.06%</u>
TOTAL ASSETS	<u>2,550,195.42</u>	<u>2,574,875.91</u>	<u>-24,680.49</u>	<u>-0.96%</u>



AS OF JUNE 30, 2022

NOTES:

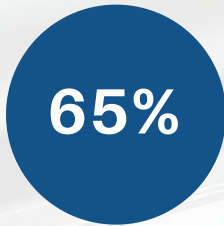
- GREEN HIGHLIGHTS INDICATE PAYMENTS OF \$122,114.77 RECEIVED THROUGH JUNE 20, 2022.
- SALMON HIGHLIGHTED PAYMENT WAS A PARTIAL PAYMENT OF \$46,295.17 RECEIVED JUNE 30,2022

	Current	1 - 30	31 - 60	61 - 90	> 90	TOTAL
PCADV Mobile ARP	590.10	0.00	0.00	0.00	0.00	590.10
PCAR-SA FVPSA ARP	6,437.40	0.00	0.00	0.00	0.00	6,437.40
PCAR - Union RSCCA	4,623.41	645.10	0.00	510.96	0.00	5,779.47
PCADV FVPSA ARP	11,283.08	69.81	0.00	9,043.75	28,864.54	49,261.18
Lycoming CoC PSH	0.00	2,815.87	0.00	5,031.26	2,845.75	10,692.88
HUD PSH Schuylkill	4,607.22	4,545.62	0.00	5,385.99	4,236.70	18,775.53
PCADV Home4Good	6,007.49	0.00	0.00	0.00	0.00	6,007.49
PCADV RRH	6,828.00	7,249.41	0.00	0.00	0.00	14,077.41
HUD CE Specialist	0.00	3,431.08	0.00	5,798.10	9,200.31	18,429.49
HUD CoC RRH Program	10,178.85	642.94	0.00	6,331.90	5,411.03	22,564.72
PCADV						
Allstate Foundation	669.76	2,853.53	0.00	1,645.71	0.00	5,169.00
PCADV	56,830.21	56,626.94	0.00	35,358.99	0.00	148,816.14
Total PCADV	57,499.97	59,480.47	0.00	37,004.70	0.00	153,985.14
PCAR-DPW						
Act 44	6,154.51	11,825.78	0.00	0.00	1,934.71	19,915.00
Title XX	2,094.17	1,368.12	0.00	141.71	0.00	3,604.00
Total PCAR-DPW	8,248.68	13,193.90	0.00	141.71	1,934.71	23,519.00
PCAR-DPW-SASP	279.02	246.75	0.00	889.52	0.00	1,415.29
PCAR DOH						
PHHS	60.71	14.67	0.00	0.00	0.00	75.38
Total PCAR DOH	60.71	14.67	0.00	0.00	0.00	75.38
STOP-Snyder County	15,397.11	5,916.18	0.00	5,585.94	0.00	26,899.23
STOP-Union County	21,921.64	7,145.73	0.00	4,031.60	0.00	33,098.97
Susquehanna Universit	4,350.13	0.00	0.00	0.00	0.00	4,350.13
PCCD.						
VOCA 20-23	109,024.91	65,795.18	0.00	69,104.31	0.00	243,924.40
Total PCCD.	109,024.91	65,795.18	0.00	69,104.31	0.00	243,924.40
YWCA of Greater Harri:	565.60	363.20	0.00	0.00	4,916.80	5,845.60
TOTAL	267,903.32	171,555.91	0.00	148,859.74	57,409.84	645,728.81

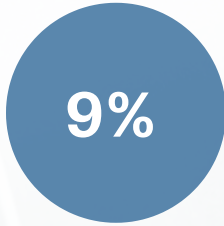
TOTAL JUNE AR AS OF 07/20/2022 IS \$477,318.87

EXPENSE DASHBOARD OVERVIEW

A Quick Breakdown



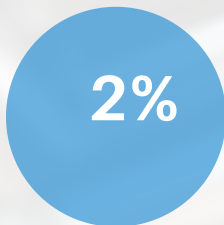
Salary and Benefits



Program Services



Program Services -
Other



Travel Expenses



Program Occupancy
Expenses



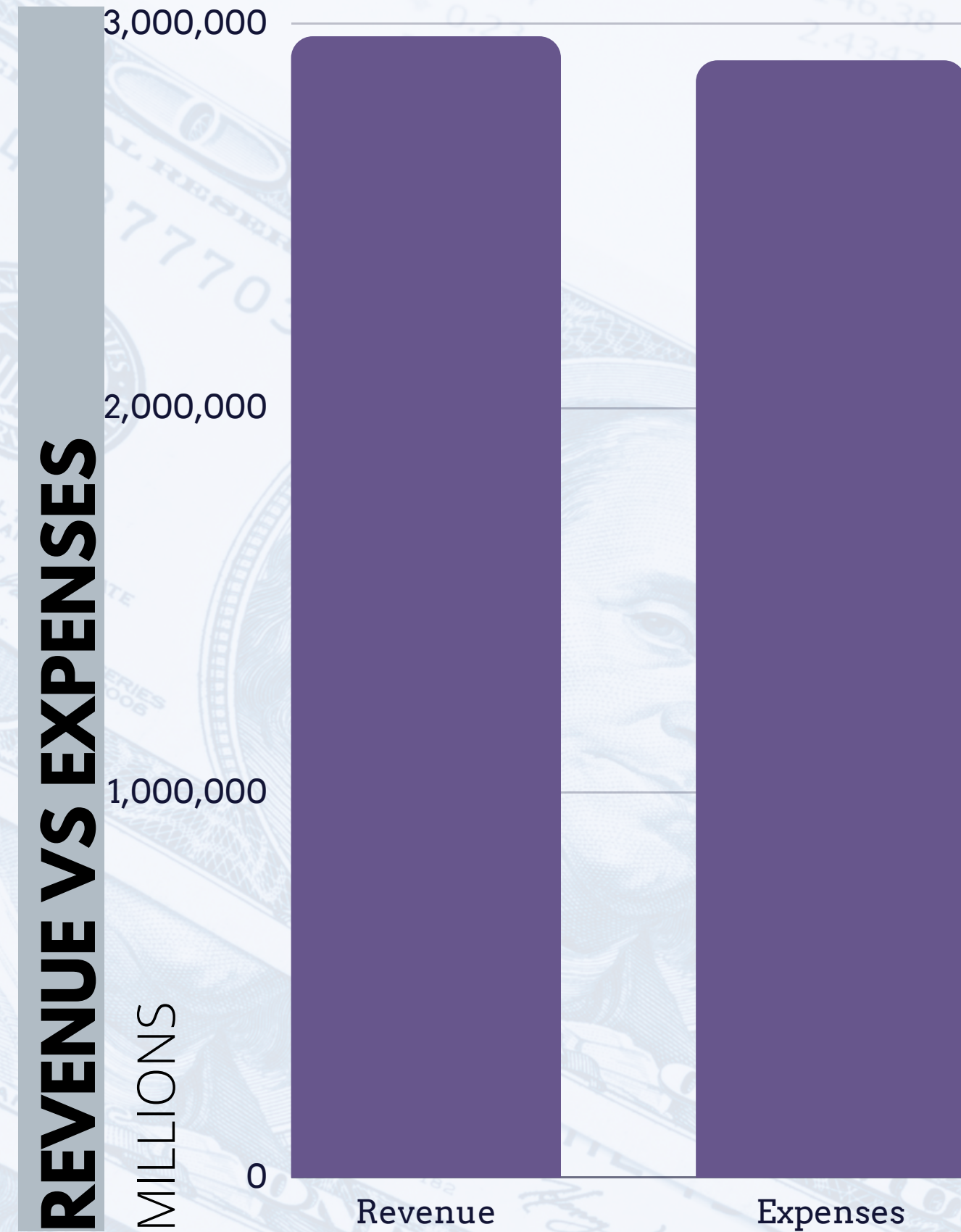
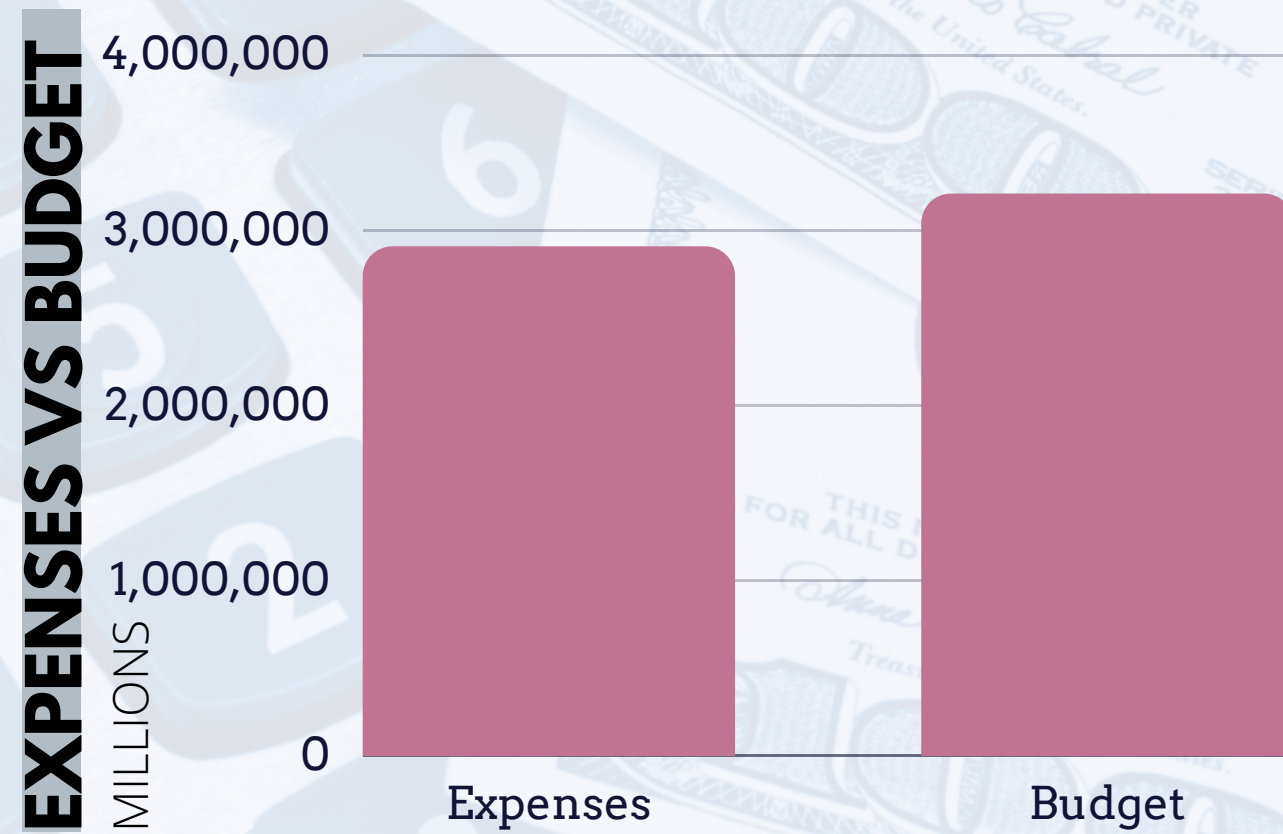
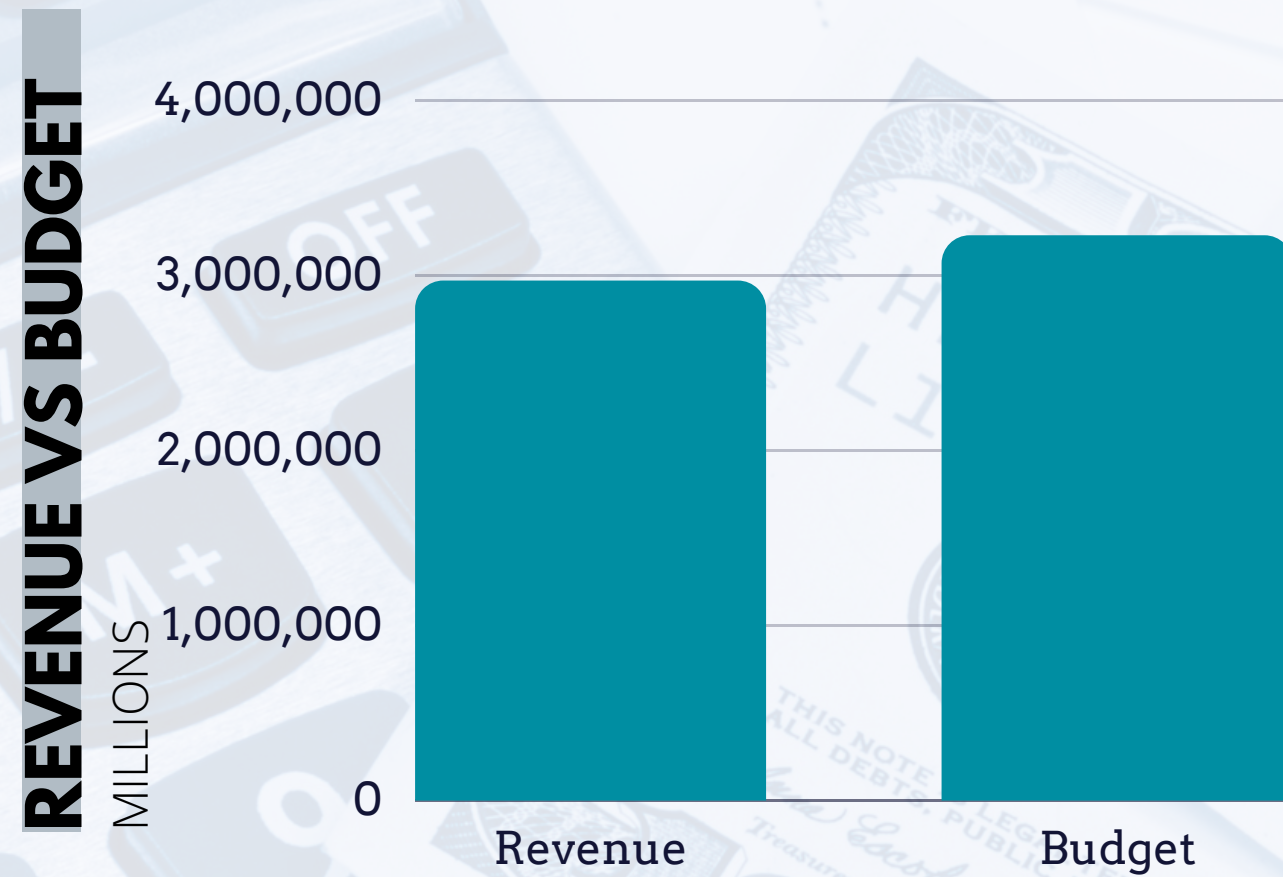
Pass Through
Expenses



MISC Expenses



12 Months Ended 06/30/22



Financials Review
Period End June 30, 2022

Full financial reports from QuickBooks for May 2022 can be found by logging into the board portal by clicking the following link: [Board Portal - Financials](#)

*Note: All income and expense categories recognize 1/12th of the budgeted amount in each month.

Notable Financial Information:

1. June finished out the fiscal year showing very good numbers for the year.
2. Fundraising/Contributions for the year reached \$358,789.96 which was 80% over budget.
3. The financials are showing a net income for FY 21 – 22 of \$62,512.07 which is 212% over budget.

Revenue:

1. Government Grants are showing at 88% for the fiscal year.
2. We ended at 92% of our total budgeted income for July through June 2022.

Expenses:

1. Total expenses were over budget by 33% for the month end of June and at 91% of the budget for July through June 2022. June expenses were higher due to year-end spending for multiple PCADV and PCAR grants.

6560 – Salaries and Wages – Salaries and wages are showing at 91% for July through June 2022.

7010 – Employee Benefits – Benefits are at 70% due to turnover in staff and will take some time to show an increase due to the introductory period of new staff receiving benefits.

7100 – Programs Services –

- 7109 – Supplies were over budget by 211% for June 2022. The budget is showing at 272% for July through June 2022. The increased June expenses were due mostly to year-end grant spending as mentioned above. The year-to-date over budget amount is due to final spending for three VOCA grants, one state PCCD Grant, and PCADV FVPSA Cares Act grants that closed on 9.30.21.
- 7130 – Telephone and Communications – 67% over budget for July through June 2022. This is an ongoing trend due to the cost of additional lines. These costs will be covered under grant modifications.

7200 – Programs Expenses – Other –

- 7210 – Advertising – 99% over budget for July through June 2022. Advertising costs continue to increase due to job postings for staffing vacancies.
- 7240 – Insurance –General – 90% over budget for July through June 2022 – some increased cost with the addition of three new vehicles to our insurance policy and an overall underbudgeting occurrence with an increase in premiums for the beginning of the FY.
- 7260 – Professional Fees – Showing at 82% over budget, mainly due to contracted Attorney Fees.

7270 – Repairs and Maintenance – showing over by 65%. This is a result of our final VOCA spend out, including the following repairs at our safe houses: Union County: repair to all exterior fire escapes, repair of front porch floorboards, painting of the front exterior of the property. Northumberland County: purchased an emergency generator, replaced of entire sidewalk on the Chestnut Street side, and repaired the rock retaining wall in front of the property.

7700 – Program Expenses-occupancy – Although as a total, program expense occupancy is under budget looking at the individual accounts of **Rent** and **COC Rental Assistance** separately shows Rent is over budget and COC Rental Assistance is under budget.

- **7710 - Rent** – showing over by 58% for July through June 2022. As stated in previous Finance Reports, this is due to underbudgeting the expense for all various office rentals across our three-county service area. Changes will be made within grant modifications to address and correct.
- **7712 – COC Rental Assistance** - 83% under budget for July through June 2022 due to limited utilization of CoC Rental and Financial Assistance.

7720 - Utilities – showing over by 44%. The safe house utility usage is up, especially for water and sewer usage.



JULY 2022

VARIANCE DASHBOARD

A VISUAL SUMMARY OF MONTH END FINANCIALS

KEY TAKEAWAYS



**Transitions is beginning FY 22-23
foreseeing another successful year ahead!**

1

Salary/Benefits Expenses

Salary expenses are at 61% of the budget for the fiscal year and benefits are at 72% due to open positions.

2

The Year To-Date

Cash remains up from last year and the Vanguard investment is beginning to bounce back.

3

Accounts Receivable

With the beginning of a fiscal year, accounts receivable are high as funders work to close out final payments for the previous year.

\$

TOTAL ASSETS

\$

As of July 31, 2022

Balance Sheet Prev Year Comparison

As of July 31, 2022

	Jul 31, 22	Jul 31, 21	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
Total Checking/Savings	631,033.17	401,817.44	229,215.73	57.05%
Total Accounts Receivable	630,181.49	781,250.80	-151,069.31	-19.34%
Total Other Current Assets	60,443.39	57,434.88	3,008.51	5.24%
Total Current Assets	1,321,658.05	1,240,503.12	81,154.93	6.54%
Fixed Assets				
Total 1600 - Property, Plant & Equipment	825,215.82	825,215.82	0.00	0.0%
Total Fixed Assets	596,369.81	620,821.73	-24,451.92	-3.94%
Other Assets				
1500 - Vanguard Brokerage	617,023.17	657,826.53	-40,803.36	-6.2%
Total Other Assets	617,023.17	657,826.53	-40,803.36	-6.2%

BUDGET VS ACTUAL

1 MONTH ENDED 07/31/2022

VARIANCE ANALYSIS MONTH OF JULY 2022

Profit & Loss Budget vs. Actual

1 month ended July 31, 2022

	Jul 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Total Income	201,056.64	279,895.75	-78,839.11	71.83%
Gross Profit	201,056.64	279,895.75	-78,839.11	71.83%
Expense				
6560 · Salaries and Wages	87,731.88	144,835.00	-57,103.12	60.57%
Total 7010 · Employee Benefits	39,431.62	54,416.00	-14,984.38	72.46%
Total 7100 · Program Services	22,139.40	11,174.00	10,965.40	198.13%
Total 7200 · Program Expenses-Other	37,883.77	12,497.00	25,386.77	303.14%
Total 7300 · Travel & meetings expenses	1,182.68	2,499.00	-1,316.32	47.33%
Total 7700 · Program Expenses-occupancy	27,682.19	42,676.00	-14,993.81	64.87%
8200 · PCADV Relocation	0.00	1,218.00	-1,218.00	0.0%
Total 8500 · Misc expenses	1,849.18	1,275.00	574.18	145.03%
Total 8700 · Passthrough Expenses	6,959.74	10,624.00	-3,664.26	65.51%
8900 · Fundraising Expenses	145.80	1,250.00	-1,104.20	11.66%
Total Expense	225,006.26	282,464.00	-57,457.74	79.66%
Net Ordinary Income	-23,949.62	-2,568.25	-21,381.37	932.53%

BUDGET VS ACTUAL

VARIANCE ANALYSIS FISCAL YEAR 2022-2023

Year to date ended 08/16/2022

	TOTAL			
	Jul 1 - Aug 16, 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Total Income	228,631.35	424,358.58	-195,727.23	53.88%
Gross Profit	228,631.35	424,358.58	-195,727.23	53.88%
Expense				
6560 • Salaries and Wages	143,931.70	219,588.55	-75,656.85	65.55%
Total 7010 • Employee Benefits	45,402.08	82,501.68	-37,099.60	55.03%
Total 7100 • Program Services	24,584.87	16,941.22	7,643.65	145.12%
Total 7200 • Program Expenses-Other	54,308.37	18,947.06	35,361.31	286.63%
Total 7300 • Travel & meetings expenses	2,703.07	3,788.81	-1,085.74	71.34%
Total 7700 • Program Expenses-occupancy	41,315.78	64,702.33	-23,386.55	63.86%
8200 • PCADV Relocation	0.00	1,847.16	-1,847.16	0.0%
Total 8500 • Misc expenses	1,757.90	1,933.06	-175.16	90.94%
Total 8700 • Passthrough Expenses	8,018.91	16,107.35	-8,088.44	49.78%
8900 • Fundraising Expenses	145.80	1,895.16	-1,749.36	7.69%
Total Expense	322,168.48	428,252.38	-106,083.90	75.23%
Net Ordinary Income	-93,537.13	-3,893.80	-89,643.33	2,402.21%

BALANCE SHEET

Previous YR
Comparison



As of July 31, 2022

	Jul 31, 22	Jul 31, 21	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1011 · M&T Bank - Checking	110,738.70	116,488.24	-5,749.54	-4.94%
1013 · M&T Capital Campaign	50,540.77	50,535.72	5.05	0.01%
1014 · M&T - Savings Account	350,056.90	115,087.37	234,969.53	204.17%
1015 · BB&T - Savings Acc	96,815.52	96,805.84	9.68	0.01%
1017 · M&T - Shamokin Capital Car	21,983.11	22,007.11	-24.00	-0.11%
1018 · First National Bank	0.00	-5.01	5.01	100.0%
1040 · Petty Cash	898.17	898.17	0.00	0.0%
Total Checking/Savings	631,033.17	401,817.44	229,215.73	57.05%
Accounts Receivable				
1110 · Accounts Receivable	630,181.49	781,250.80	-151,069.31	-19.34%
Total Accounts Receivable	630,181.49	781,250.80	-151,069.31	-19.34%
Other Current Assets				
Account for Credit Transfer	177.26	176.26	1.00	0.57%
1450 · Prepaid Expenses	59,726.13	56,718.62	3,007.51	5.3%
1460 · Security Deposits	540.00	540.00	0.00	0.0%
Total Other Current Assets	60,443.39	57,434.88	3,008.51	5.24%
Total Current Assets	1,321,658.05	1,240,503.12	81,154.93	6.54%
Fixed Assets				
Total Fixed Assets	596,369.81	620,821.73	-24,451.92	-3.94%
Total Other Assets	617,023.17	657,826.53	-40,803.36	-6.2%
TOTAL ASSETS	2,535,051.03	2,519,151.38	15,899.65	0.63%



AS OF JULY 31, 2022

NOTES:

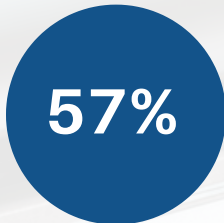
- BLUE HIGHLIGHTS INDICATE PAYMENTS OF \$60,927.00 RECEIVED THROUGH AUGUST 15, 2022.
- GREEN HIGHLIGHTED PAYMENT WAS A PARTIAL PAYMENT OF \$2,730.00 RECEIVED AUGUST 2, 2022

	Current	1 - 30	31 - 60	61 - 90	> 90	TOTAL
PCADV Mobile ARP	372.23	0.00	590.10	0.00	0.00	962.33
PCAR-SA FVPSA ARP	1,243.11	0.00	0.00	0.00	0.00	1,243.11
PCAR - Union RSCCA	0.00	0.00	4,623.41	645.10	510.96	5,779.47
PCADV FVPSA ARP	2,828.76	0.00	11,283.08	69.81	0.00	14,181.65
Lycoming CoC PSH	1,925.00	0.00	0.00	0.00	0.00	1,925.00
HUD PSH Schuylkill	4,714.43	0.00	0.00	0.00	0.00	4,714.43
PCADV Home4Good	744.89	0.00	6,007.49	0.00	0.00	6,752.38
PCADV RRH	4,179.65	0.00	6,828.00	0.00	0.00	11,007.65
HUD CoC RRH Program	2,976.75	0.00	0.00	0.00	0.00	2,976.75
PCADV						
Allstate Foundation	0.00	0.00	669.76	2,853.53	1,645.71	5,169.00
PCADV	63,445.80	0.00	52,330.97	14,831.01	0.00	130,607.78
Total PCADV	63,445.80	0.00	53,000.73	17,684.54	1,645.71	135,776.78
PCAR-DPW						
Act 44	14,434.73	0.00	0.00	0.00	0.00	14,434.73
Title XX	1,665.66	0.00	0.00	0.00	0.00	1,665.66
Total PCAR-DPW	16,100.39	0.00	0.00	0.00	0.00	16,100.39
PCAR-DPW-SASP	0.00	0.00	279.02	246.75	889.52	1,415.29
PCAR DOH						
PHHS	538.51	0.00	60.71	0.00	0.00	599.22
Total PCAR DOH	538.51	0.00	60.71	0.00	0.00	599.22
STOP-Snyder County	11,748.84	0.00	15,397.11	5,916.18	5,585.94	38,648.07
STOP-Union County	3,376.32	0.00	21,921.64	7,145.73	4,031.60	36,475.29
Susquehanna Universi	897.24	0.00	0.00	0.00	0.00	897.24
PCCD.						
VOCA 20-23	48,338.62	0.00	153,591.12	65,781.30	68,213.00	335,924.04
Total PCCD.	48,338.62	0.00	153,591.12	65,781.30	68,213.00	335,924.04
YWCA of Greater Harri	456.80	0.00	565.60	363.20	4,916.80	6,302.40
TOTAL	163,887.34	0.00	274,148.01	97,852.61	85,793.53	621,681.49

TOTAL JULY AR AS OF 08/16/2022 IS \$558,024.49

EXPENSE DASHBOARD OVERVIEW

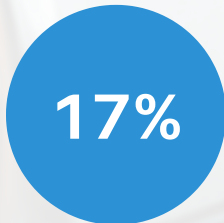
A Quick Breakdown



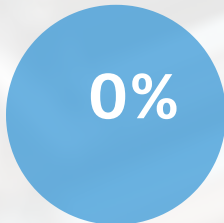
Salary and Benefits



Program Services



Program Services - Other



Travel Expenses



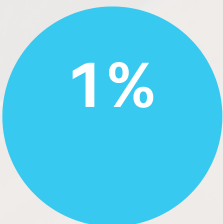
Program Occupancy Expenses



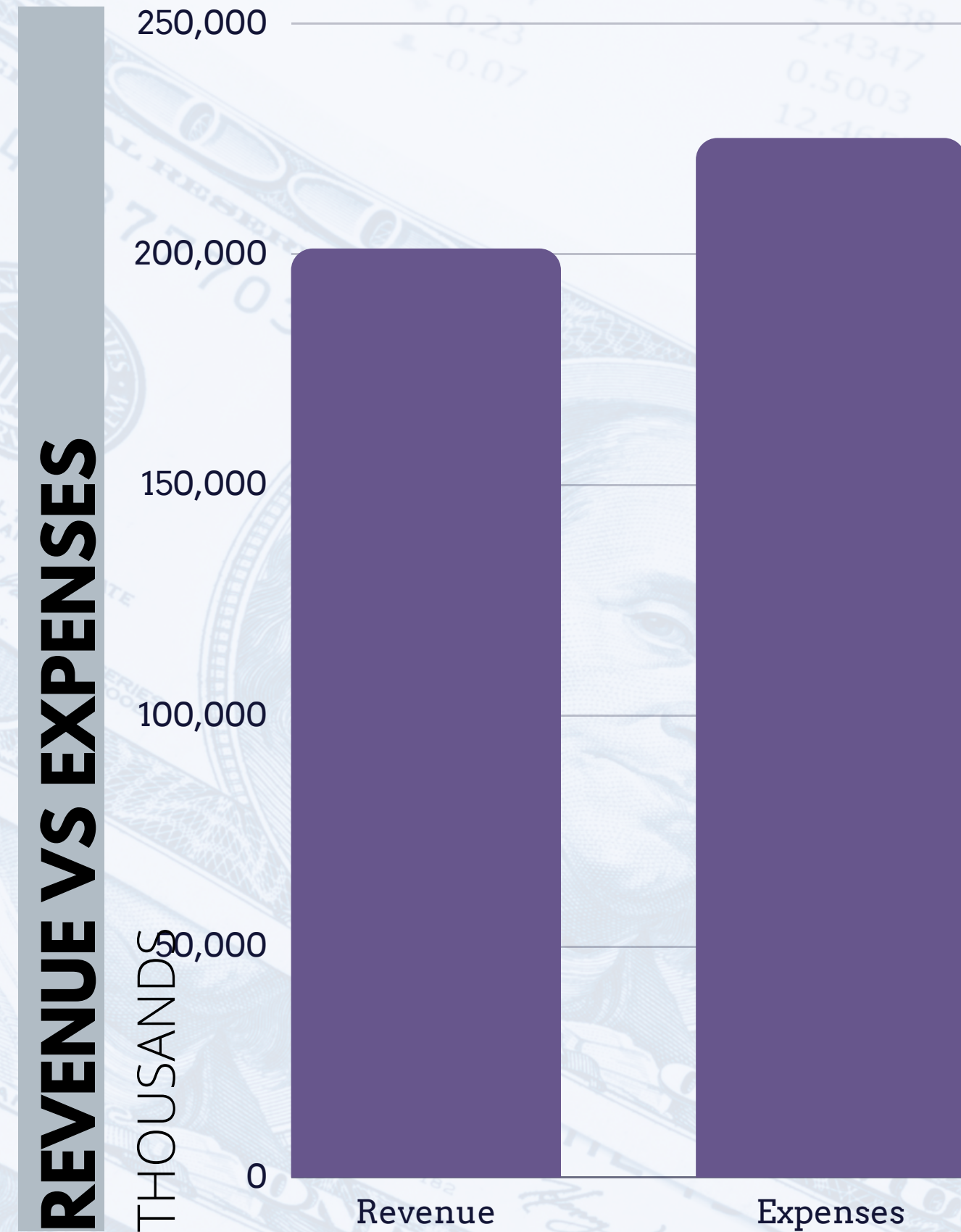
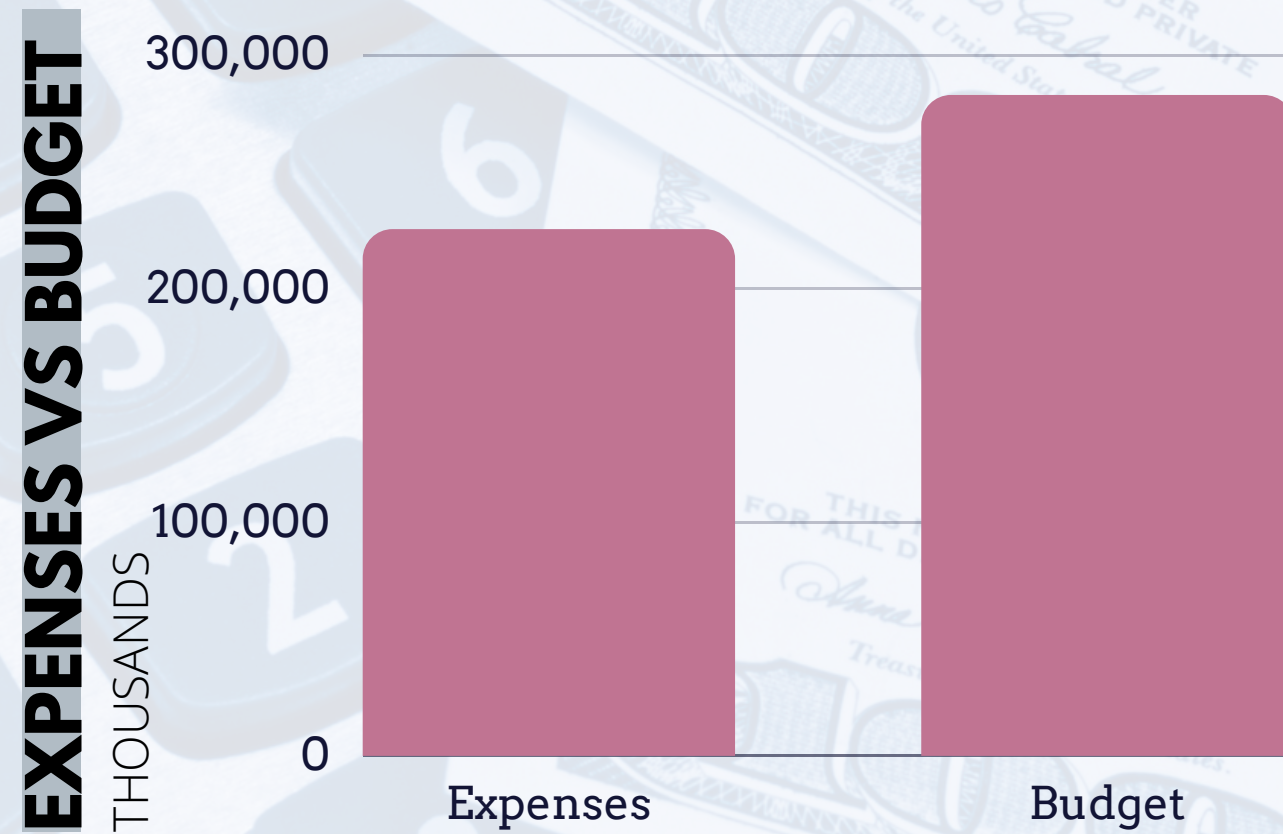
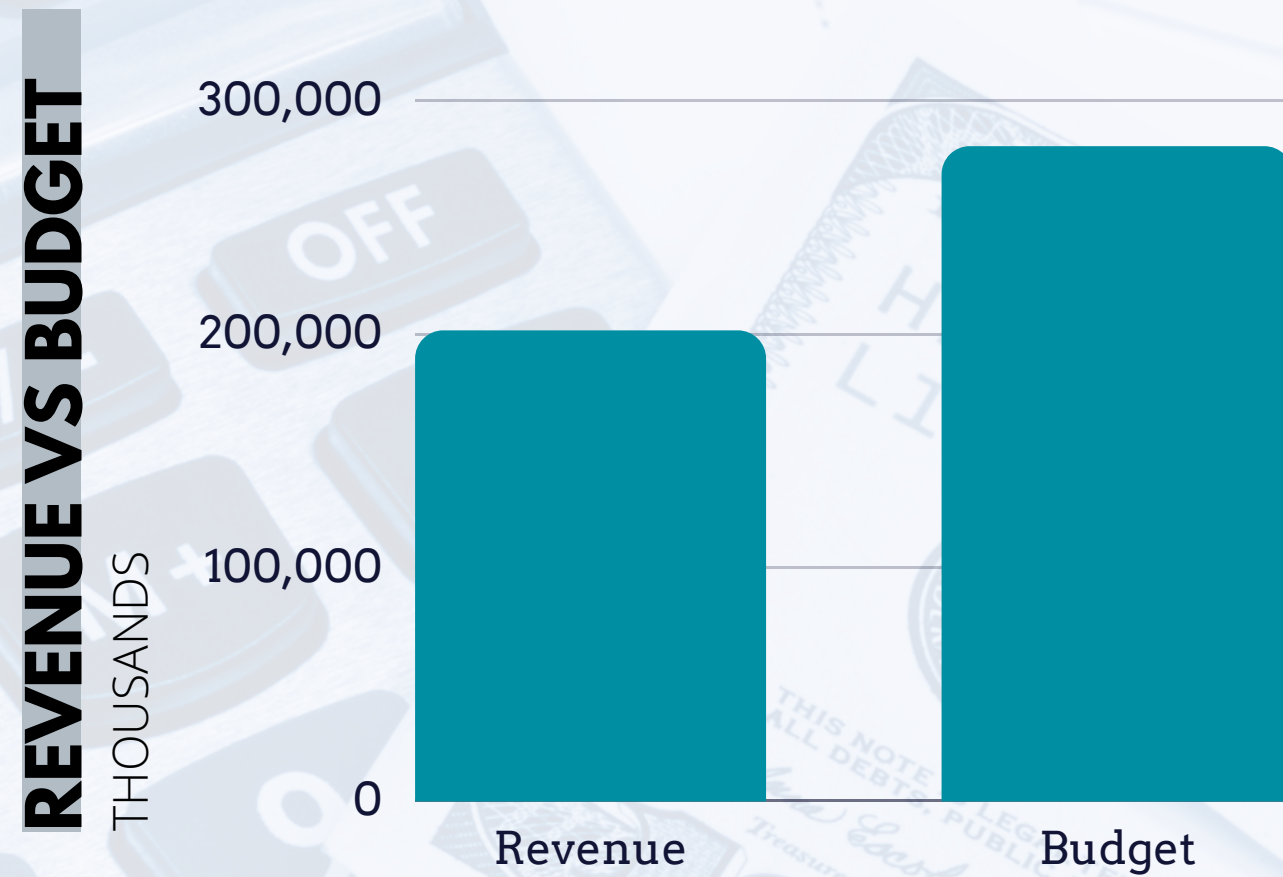
Pass Through Expenses



MISC Expenses



1 Months Ended 07/31/22



Financials Review
Period End July 31, 2022

Full financial reports from QuickBooks for May 2022 can be found by logging into the board portal by clicking the following link: [Board Portal - Financials](#)

*Note: All income and expense categories recognize 1/12th of the budgeted amount in each month.

Notable Financial Information:

1. Starting off the first month of the fiscal year, cash is still showing a 57% increase over last year.
2. Vanguard investment is bouncing back showing a \$33,000 increase from last month, but still 6% down from last year.
3. Accounts Receivables are strong with a total of \$621,681.49 on 7/31/2022.

Revenue:

1. Government Grants are showing at 62% for the first month of the fiscal year.
2. The total income for July 2022 was 72%.

Expenses:

1. Total expenses were at 80% for July.

6560 – Salaries and Wages – Salaries and wages are showing at 61% for July 2022. Our budgeted amount for salaries and wages is for full staffing.

7010 – Employee Benefits – Benefits are at 72% due to turnover in staff and will take some time to show an increase due to the introductory period of new staff receiving benefits.

7100 – Programs Services –

- 7130 – Telephone and Communications – 58% over budget for July 2022. Multiple bills for PenTeleData were processed in July so next month should show a decrease.

7200 – Programs Expenses – Other –

- 7160 – Equip Rental – 93% over budget for July 2022. Copier rental was paid twice in July 2022.
- 7162 – Equipment Maintenance – 810% over budget for July 2022. This is due to the cost for IT to enable Duo Security on all computers and laptops and to install appropriate software updates.
- 7210 – Advertising – 331% over budget for July 2022. Advertising costs continue to increase due to job postings for staffing vacancies.
- 7240 – Insurance –General – 1,085% over budget for July 2022 due to prepaid expenses for the year.
- 7260 – Professional Fees – Showing at 44% over budget, mainly due to contracted Attorney Fees.

7270 – Repairs and Maintenance – showing over by 278%. This is due to the costly repairs to the sewer line at the Shamokin Safe House.

7720 - Utilities – showing over by 113%. The safe house utility usage is up, especially for water and sewer usage. There was also a delivery of fuel to the Admin Office in July which occurs about 5 times a year.

8505 – Indirect Expense Allocations – showing over 222% due to a new reporting procedure used to report our indirect expenses for our STOP grants.

Summary Submitted by Jan McGrath, Finance Director.

June 2022 AGENCY REPORT

CEO REPORT

by Mae-Ling Kranz, CEO

May was a busy month with primary focus given to finishing up any required grant renewals and in preparation for our annual charity auction as we closed in on final sponsors and donors.

Our annual auction was a great success! With personal budget goals of raising \$50,000 in sponsorships for the event and netting \$100,000 at the end of the event, I am excited to report that we did both! This was our most successful auction ever with us raising approximately \$126,000 total and netting right around \$110,000!

Thank you for all the help from each of you, and especially the members of the board who are on the auction committee! On to planning next year's event!

We also saw a few major staffing changes towards the end of May/beginning of June with the resignation of Tara Ulrich, Programs Director, and the new board-approved Organizational Chart change showing two Program Directors breaking that previous role into two. Jamie Grobes, previously Legal Advocacy Coordinator, and Shannon Fisher, previously Counseling Advocacy Coordinator. We are excited and pleased to see them in their new roles!

Additionally, we filled our long-vacant position of Residential Services Coordinator. Allison Holmes joined the team and is working through orientation at this time! Her photo will be forthcoming in the next board report.

Operations at the Northumberland County Safe houses were temporarily paused as there was a sewage issue in the basement with a collapsed line. We were able to have the existing cement floor removed and a PVC pipe placed where the previously clay pipe was, fixing the issue with the line. The house has since reopened. We are thankful this was not a larger issue! All other services remain fully operational at this time.

PROGRAMS DIRECTOR REPORT

by Mae-Ling Kranz, CEO

With Tara Day Ulrich's exit from the Program Director role, and the promotion of Jamie Grobes and Shannon Fisher into their new board-approved roles as dual Program Directors, there is no specific report to provide in this section this month as Jamie and Shannon report in other sections as part of their former roles. Shannon is responsible for supervising the Counseling Department, the safe houses, and our housing program and will be working with the rest of the Leadership Team on evaluating our best practices being utilized internally for programming. Jamie is responsible for the Transitions Legal Center, Legal Advocacy, and Fair Family Justice Center, and will be working with the remainder of the Leadership team on improving our systems advocacy efforts in our communities.

LEGAL ADVOCACY REPORT

by Jamie Grobes, Program Director

New Legal Referrals	79
PFA/SVPO Petitions Filed	10
Snyder County	0
Union County	1
Northumberland County	9
PFA/SVPO Hearings Held	22
Snyder County	2

Union County	0
Northumberland County	20
Other Petitions and Hearings	7
Emergency Custody	3
Preliminary Hearing	2
Indirect Criminal Contempt	1

SAFE HOUSE REPORT

by, Shannon Fisher, Program Director

Safe house requests appear to have slowed during May. The Northumberland County safe house was temporarily closed due to a collapsed sewer pipe. All guests were moved to the Union County safe house during the disruption. The safe house was closed for approximately 2 weeks while bids were received, and the repairs completed. During that time, the emergency generator was finally installed following several delays related to supply chain problems and worker shortages.

	Adults	Children
Number of New Clients	3	10
Number of Safe House Nights	407	407

FAIRL FAMILY JUSTICE CENTER REPORT

by, Jamie Grobes, Programs Director

Megan Kopitsky had hit the ground running in her new role as the FJC Coordinator. Drawing from her experiences as a Visitation Monitor at the FJC for years, she's able to pull from real experience and apply her recent academic accomplishments. Megan just completed her Master's and her thesis at Bucknell University with a focus on adverse childhood experiences and the coloration of campus sexual assault. Many of the staff took the opportunity to attend her presentation as she defended her thesis and were amazed by the caliber of dedication and understanding that she has of victim trauma and sexual assault survivors. As an organization, we are thrilled to have such a tremendous resource in her and plan to capitalize on her efforts and knowledge to better serve victims.

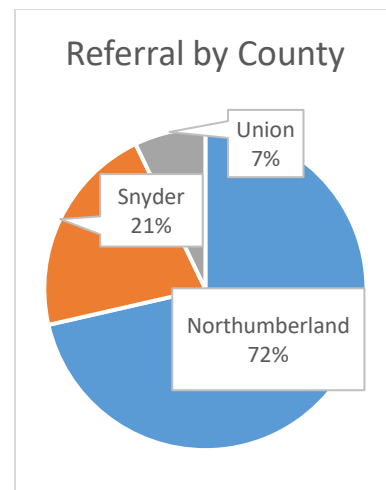
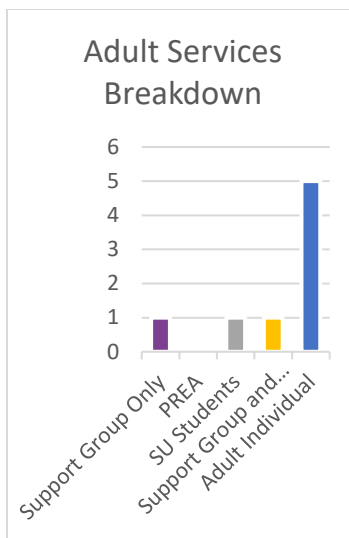
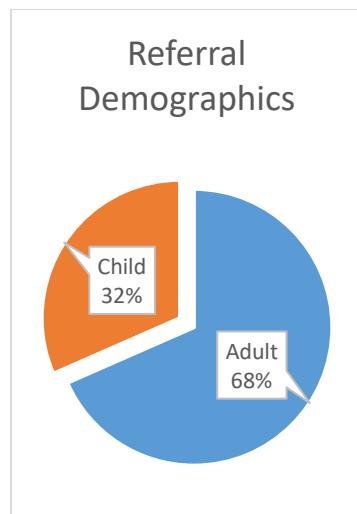
Melissa Whistler is our new Visitation Monitor. She had started her training before Megan's start and is nearly completed with that process. Interviews are being scheduled over the next week to fill the remaining Visitation Monitor positions.

	Visits	Exchanges
May 2022	0	0

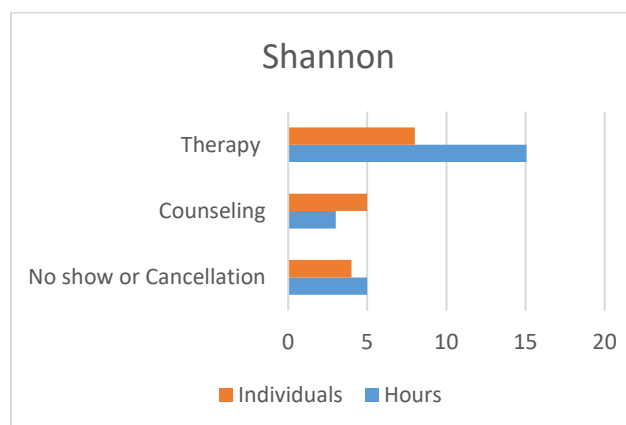
COUNSELING SERVICES REPORT

by Shannon Fisher, Programs Director

In May 2022 all referrals for the individual child and adult services were suspended, except for adult group referrals. Referrals could be submitted for tracking purposes, but clients were told we were unable to take on new counseling clients. The suspension of new clients for counseling services is due to existing caseloads, waitlists, and limitations for counseling staff. Clients could still receive crisis counseling through the hotline. Safe house clients still received services. Referring advocates were also asked to check in on clients who requested counseling services. Despite being requested to still put referrals through for tracking purposes, there was a sharp decline in the number of referrals made for counseling services in May 2022. There were 15 referrals received, 6 children, and 9 adults. Of the child referrals, 5 were for children in the safe house and 1 was a community-based referral. Of the 9 adult referrals, 1 was a student at Susquehanna University and 1 was a safe house guest, the remaining 7 referrals were community-based adult referrals.

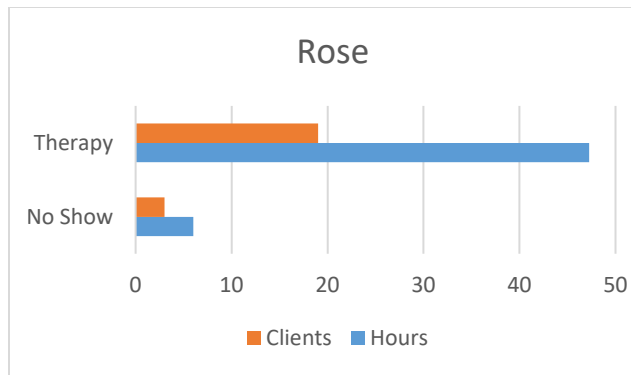


Shannon – Counseling Advocacy Coordinator



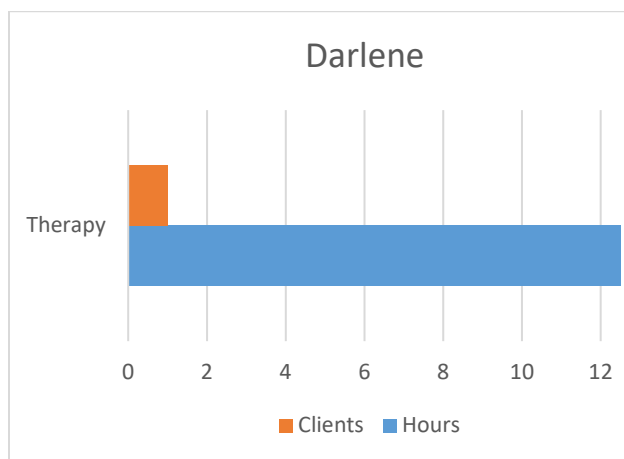
Shannon's time outside of counseling and therapy sessions was spent training new hires and supporting new staff and learning the role of the program director as it specifically pertains to understanding the housing program. Shannon also filled in at the FJC supervising visitation due to staffing shortages. Shannon was also on vacation for one week of the month as demonstrated by the decrease in hours of services provided.

Rose – Therapist



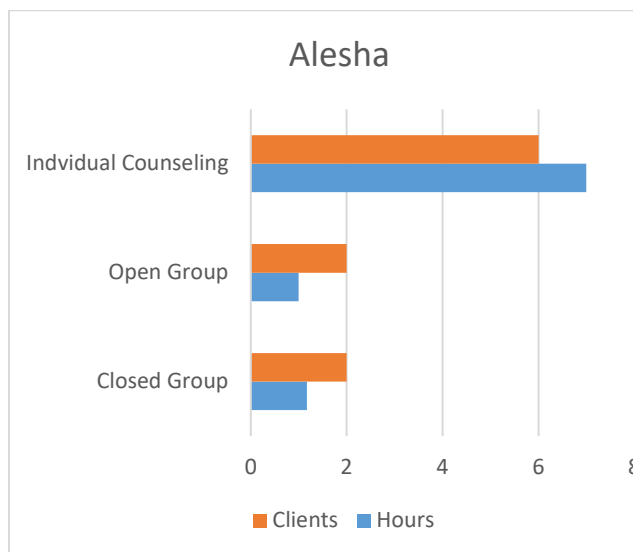
Rose's time outside of therapy sessions was spent providing system advocacy, participating in EMDR group supervision, and studying for the clinical licensing exam. She also spent time collaborating for the public showing and panel discussion for Wisdom of Trauma. Rose passed her Clinical exam. Rose participated in the Self-Care Summit. Rose was off for one week of the month.

Darlene – Contracted Therapist



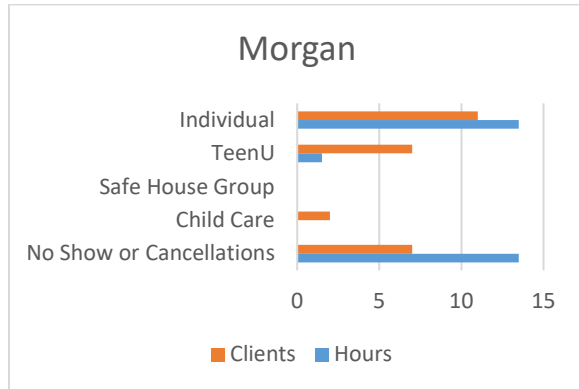
Darlene has one client to whom she is currently providing services.

Alesha – Group Facilitation Specialist



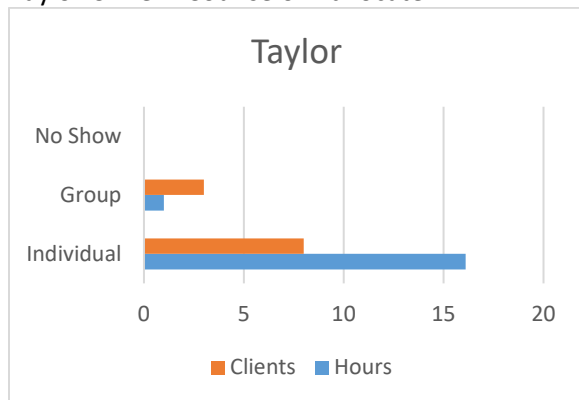
Alesha served 120 people through community groups for a total of 5.83 hours of group time. She had 22 people disclose human trafficking. Due to resuming her groups at White Deer Run, Alesha spent time outside of her direct client time training staff on how to assist in entering group information into the electronic database which is extremely time-consuming. Alesha continues to be enrolled in a graduate social work program. Alesha assisted in covering supervised visits at the FJC and hotline as needed. Alesha participated in the weeklong training on Diversity, Equity, and Inclusion and was also on vacation for one week of the month.

Morgan – Child Advocate



Morgan's caseload had some changes in May with closing children and taking on new ones. Morgan has also done some system advocacy in the month by joining the education staff at community events. TeenU at the REC ended on May 21, 2022 and will resume in the fall. Morgan participated in the weeklong training on Diversity, Equity, and Inclusion. There were no children in the safe house present for the group.

Taylor Ulmer - Counselor Advocate



Taylor's caseload decreased during the month due to the number of guests in the safe house decreasing and a few guests declining the services. Taylor continued to work on the 'Red Rover' program for pets affected by DV. She attended a training in May on this topic and presented the information to her supervisor for further discussion with leadership. Taylor has covered the hotline and safe house as needed, filled vacancies at the FJC for supervised visitation, and provided childcare. Taylor continues to

seek out additional counseling-related training to hone her skills and benefit her clients. Due to partial staff-wide training, Taylor spent a full week in the safe house in May to assure guests' needs were managed. Taylor continues to look at her schedule and find a good time to offer a safe house group to generate more participation from guests.

Albra Heineman - Campus Advocate

Albra began her employment with Transitions of PA on May 2, 2022. Albra spent 2 weeks completing the required modules and classroom training before being stationed at Susquehanna University full time. In the time she has been at Susquehanna, Albra has reached out to and met with several students, The Engaging Men's Committee, Campus Safety, met with the Dean and Title IX Coordinator. She also participated in interviews for AVP Candidates for Student Life. Albra also worked with the Title IX Coordinator to write and submit a \$10,000 grant application through the Pennsylvania Coalition of Domestic Violence. This grant would create an educational pro-social program that promotes healthy relationship development, peer mentorship, and support, to foster a safe and supportive community environment for LGBTQIA+ youth and emerging adults residing in Snyder County and students at Susquehanna University. Albra has submitted a request to complete the Koru Mindfulness teacher certification. Koru Mindfulness is an evidence-based curriculum specifically designed for teaching mindfulness, meditation, and stress management to college students and other young adults.

Certification would allow Heineman to use the techniques in her work with SU students and staff and in-house residents at Transitions.

Additional Training & Assessments

- Completed ATIXA (Association of Title IX Administrators) Webinar: “Strategies to Prevent Student Sexual Violence”.
- Completed Clifton Strengths Assessment – Results: Input, Adaptability, Intellection, Ideation, Empathy
- Applied for membership to CAPP (Campus Advocacy & Prevention Professionals). This selective organization is made up of professionals from across the county who come together to share ideas and programming.
- Applied to serve on the board of the Penn State Harrisburg Institute of State and Regional Affairs (ISRA) Rural Needs Assessment Advisory Board and the “An Exploration of Intimate Partner Violence in Rural Pa” project.
- Completed *Sexual Citizens* Space Toolkit Training. *Sexual Citizens* by Jennifer S. Hirsch and Shamus Khan represents an entirely new way to understand sexual assault. Their insights transcend current debates about consent, predators in a “hunting ground”, or the dangers of hooking up. *Sexual Citizens* reveals the social ecosystems that make sexual assault a predictable element of life on a college campus. The powerful concepts of sexual projects, sexual citizenship, and sexual geographies provide a new language for understanding the forces that shape young people’s sexual relationships.
- Created Orientation Video for Everfi Modules – all SU students must complete the training. The video included a short overview of the services offered by Transitions at SU, the location, of the VIP Center, and a short bio of Heineman.
- Invited panelists for an upcoming Penn State University and Susquehanna University for “Leap: Leadership 101 Pre-College Program” for emerging adults. Heineman will speak on the topic of “Social Change at Work” and how commitment is defined in the social change pillar model as *an intrinsic passion, energy, and purposeful investment toward action. Commitment without self-awareness can be easily misdirected. Commitment is also the energy to serve the group and its goals.*

HOUSING REPORT

by Nina Blair, Housing Coordinator

The housing department is currently in the process of obtaining more referrals for the PSH and RRH Programs. All clients enrolled are currently housed and successfully maintaining housing. (3) have gained employment, (2) are currently actively working on higher education, one graduating this fall 2022, with a masters. The housing team has been productive in landlord engagement, incl. the most recent invitation with the Lycoming County Housing Coalition, Landlord Resource Fair. Nina has obtained SOAR certification and Brooke and Suzanne are currently, working on obtaining their certifications as well. (4) Successful exits this month, survivors, still maintaining housing and self-sufficiency. (1) household, had a healthy baby boy and adjusting well.

Vacant Positions	RRH Advocates X's 2
Rapid Rehousing	7 households currently enrolled 7 currently housed 2 Successful Exits
Permanent Supportive	6 households currently enrolled 6 currently housed 2 Successful Exits



Relocation Funds/Homes for Good

Assisted 3 Survivors and their families in relocating and obtaining/maintaining housing with Homes for Good Grant. Assisted 2 survivors with household goods/needs.

Economic Justice Grant

Assisted 3 Survivors with new bikes, 10 with transportation (gas cards & Bus tickets), Assisted 4 survivors with interview/employment clothing needs

DV Coordinated Entry

by Jennifer Taylor, DV Coordinated Entry Specialist

- Partnership engagement:
 - By Name List case management calls (with Regional Managers, mainstream providers, and victim service providers) - 12
 - Regional Homeless Advisory Boards (Including CoC Veterans meetings) - 3
 - DV Coordinated Entry Planning partner meetings (with PCADV, United Way, and/or Capacity for Change) – 4
 - Susquehanna University stakeholder's meetings and campus tour for newly hired Campus Advocate
- Training Provided:
 - Domestic Violence for Coordinated Entry
 - Newly hired Regional Manager for the Lehigh Valley
- Training Received:
 - 5-Day Retreat
 - Beyond Diversity 101
- Case management/direct services for Continuum of Care DV survivors ('caseload')
 - 7 clients

EDUCATION REPORT

by Lisa Eroh, Outreach Coordinator

May 2022 Social Media Engagement Statistics

Transitions Google Profile report:

- 219 people visited our website from our profile (decrease = 2%)
- 120 people reached out via telephone (increase = 8%)
- 1,094 profile views (decrease = 5%)
- 351 searches (decrease = 8%)

Facebook:

- Reached 7,536 people (decrease = 41.5%)
- Received 1,786 likes
- Age range with largest representation = 35-44 (for both women and men)

Instagram:

- Reached 107 people (decrease = 64.7%) (we were having some technical difficulties with our Instagram account)
- 394 followers
- The age range with the largest representation is 35-44 (women) and 25-34 (men)



Lisa Eroh, M.A.
Outreach Coordinator

- Provided new staff training
- Took part in the Coffee Day at Kelly Elementary School (66 staff attendees)
- Assisted Heather Shnyder with the student programs at Selinsgrove High School
- Started to provide supportive counseling services to individual
- Took part in the Summer Kick-Off tabling event at Shikellamy High School
- Worked on solicitation for auction
- Attended auction committee meetings



Heather Shnyder
Health Systems Training Specialist

- Provided Human Trafficking Training to new staff
- Took part in the Coffee Day at Kelly Elementary School (meet and greet with staff)
- Met with Evangelical Community Hospital mobile unit to discuss ways that we can collaborate with our clients who are unable to get to medical providers' offices
- Delivered the Student Commercial Sexual Exploitation Program to 108 students at the Selinsgrove High School
- Started to work with an intern, Larissa Shearer, from the YES to the Future Program
- Attended the Senior Health & Wellness Day at the Miller Center (sponsored by Evangelical Community Hospital)



Nicole Yeager
Education Specialist

- 2 counseling sessions with 1 adult clients
- Created and published 15 social media posts on the Transitions Facebook and Instagram Page
- Presented 2 programs at Linntown Intermediate School
- Held 2 TeenU sessions at the Selinsgrove R.E.C.
- Assisted with Auction solicitation
- Started to work with Teen Counseling client

"This month marks my return from maternity leave on May 9th. This month we held the final TeenU session for the school year with plans to restart the program in the fall. We are also working on starting another TeenU program at the Donald Heiter Center in Lewisburg." - Nicole



Jolene Nickle
Education Specialist

- Took part in the Coffee Day event at Kelly Elementary School
- Met with area organizations (the REC, The Miller Center, Sunbury YMCA, Mifflinburg YMCA, CSIU, BVRA, and the Donald Heiter Center) to discuss providing programs at their summer camps
- Attended the Northumberland County Head Start Policy Council meeting with Heather S.
- Provided the Safe Dates program to 5 students in CSIU 5 Start program
- Attended the MACC Kids Fair and provided instructional games for children, spoke with parents as well as other community partners who were in attendance
- Planned half-day camps for area schools and disseminated information to those schools

To check out more of what is happening with the Transitions of PA team, check out our website and social media accounts by clicking on the icons below.



JULY 2022 AGENCY REPORT

CEO REPORT

by Mae-Ling Kranz, CEO

Over the last two months (June & July) our focus has remained steadfast on filling our vacancies across the organization and jumping our new fiscal year off on a positive note as we prepare for our annual audit and submission of our final reports from FY21-22's grant periods.

Allison Holmes joined the team as our new Residential Services Coordinator in June and has been busy working through training and hands-on learning in her new role.

Additionally, Casey Reinard joined the team in July as one of our part-time visitation monitors at the Family Justice Center.

We continue to have multiple additional full-time vacancies we are attempting to fill successfully. The labor market remains a challenge with many applicants choosing to go with other roles, not following up with us after multiple attempts, and sometimes scheduling and just not showing up. We currently have seven full-time positions vacant, and one part-time position vacant.

The organization took some time to work to physically clean up our workspaces and held a yard sale at the end of July 2022 raising just over \$700.00. Thank you to all board members who donated items to the sale!

Although early, we've already begun planning for Domestic Violence Awareness Month in October and are excited to be working with the contracted Non-Profit Marketing Strategist, Kendra Parke, facilitated through the Greater Susquehanna United Way on print and digital information that will be coming out over the next month.

LEGAL ADVOCACY REPORT

by Jamie Grobes, Program Director

JUNE 2022

New Legal Referrals	61
PFA/SVPO Petitions Filed	10
Snyder County	1
Union County	4
Northumberland County	5
PFA/SVPO Hearings Held	29
Snyder County	2

Union County	3
Northumberland County	24
Other Petitions and Hearings	7
Emergency Custody	2
Preliminary Hearing	2
Indirect Criminal Contempt	3

JULY 2022

New Legal Referrals	64
PFA/SVPO Petitions Filed	10
Snyder County	3
Union County	1
Northumberland County	7
PFA/SVPO Hearings Held	21
Snyder County	3

Union County	4
Northumberland County	14
Other Petitions and Hearings	5
Emergency Custody	1
Preliminary Hearing	2
Indirect Criminal Contempt	2

SAFE HOUSE REPORT

by, Shannon Fisher, Program Director

June 2022	Adults	Children
Number of New Clients	5	2
Number of Safe House Nights	218	218
July 2022	Adults	Children
Number of New Clients	8	7
Number of Safe House Nights	149	158

FAIRL FAMILY JUSTICE CENTER REPORT

by, Jamie Grobes, Programs Director

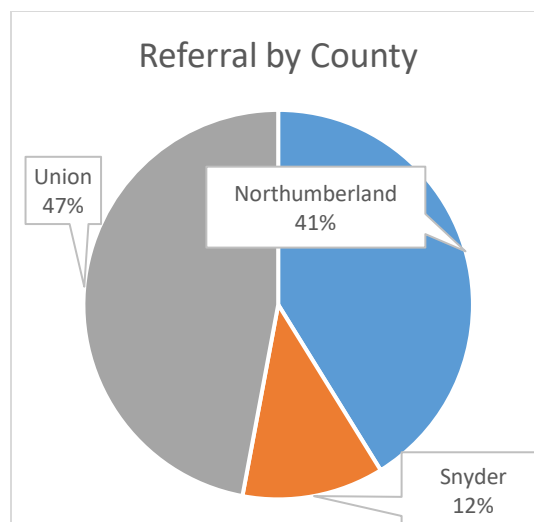
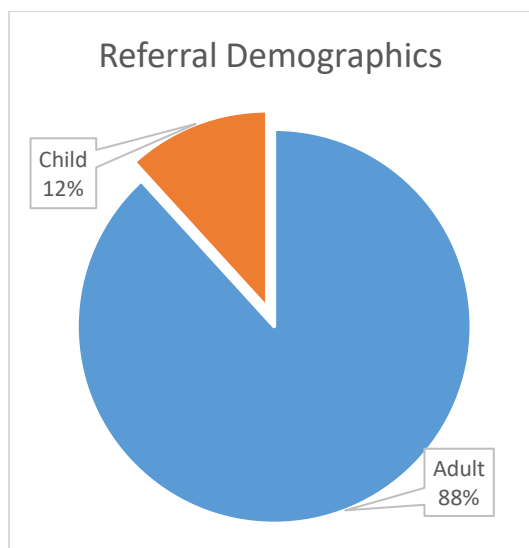
	Visits	Exchanges
June 2022	8	0
July 2022	15	0

June was a busy month of training and building a client base for the Fairl Family Justice Center. Megan Kopitsky began in her role as Fairl Family Justice Coordinator the week of June 6. Upon completing her initial training and orientation as a supervisor, she hit the ground running and completed orientation for services with four new families. Additionally, our new visitation monitor, Melissa Whistler, completed her training in June and began monitoring visits. As of the end of June, the supervised visitation schedule is full. We also continued to recruit new supervised visitation monitors in anticipation of expanding our supervised visitation schedule.

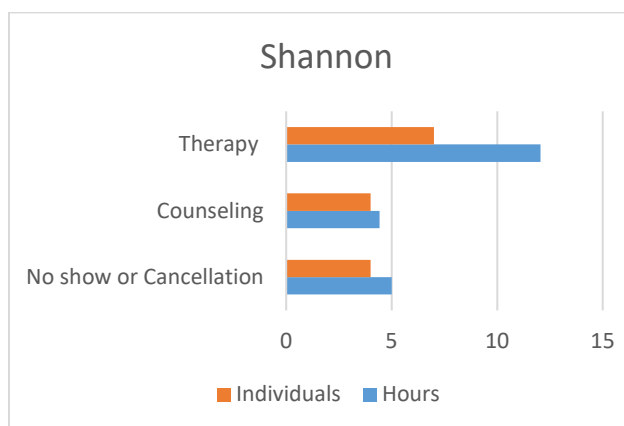
COUNSELING SERVICES REPORT

by Shannon Fisher, Programs Director

In June 2022 all referrals for the individual child and adult services were suspended, except adult group referrals. Referrals could be submitted for tracking purposes, but clients were told we were unable to take on new counseling clients. The suspension of new clients for counseling services is due to existing caseloads, waitlists, and limitations for counseling staff. Clients could still receive crisis counseling through the hotline. Safe house adults and children still received services. Referring advocates were also asked to check in on clients who requested counseling services. Despite being requested to still put referrals through for tracking purposes. There were 17 referrals received, 2 children, and 15 adults. Of the child referrals, 1 was for a child in the safe house, and 1 was a community-based referral. Of the 15 adult referrals, 4 referrals were for PREA, 3 were safe house guests, and the remaining 8 referrals were community-based adult referrals.

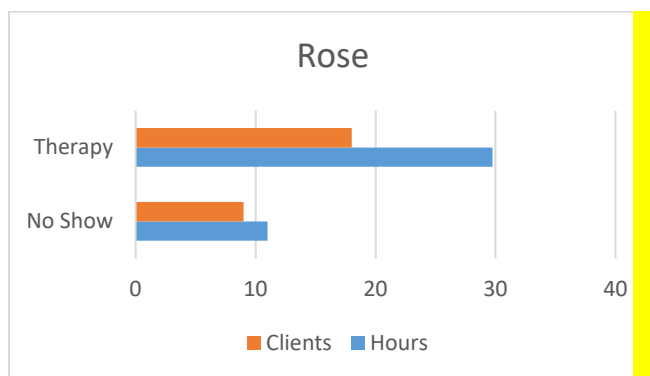


Shannon – Counseling Advocacy Coordinator/Programs Director



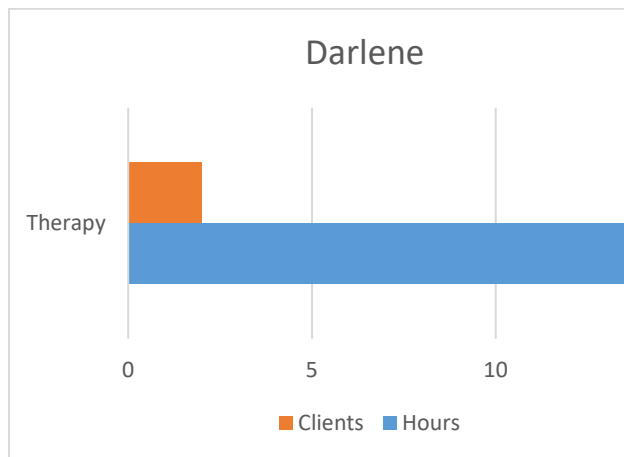
Shannon's time outside of counseling and therapy sessions was spent in the role of the program director and the daily tasks associated with that position. Shannon's caseload decreased due to closing several clients due to the new role with the organization.

Rose – Therapist



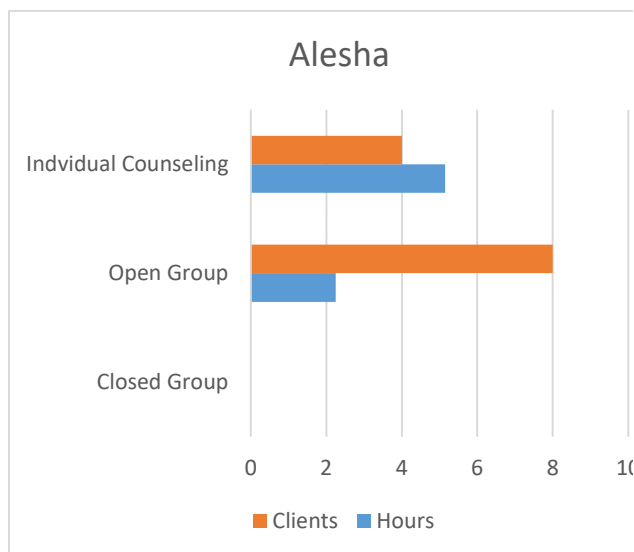
Rose passed her clinical exam and is now a Licensed Clinical Social Worker. Additionally, she applied for certification as an EMDR Therapist. Time outside of providing direct therapy was spent providing system advocacy. Rose used the time off during June and worked 10 of the eligible 22 days for the month. Rose had two clients close in June. One was a successful therapy completion and the other was closed due to lack of participation.

Darlene – Contracted Therapist



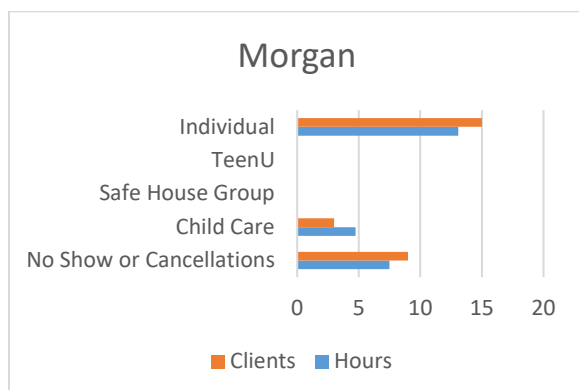
Darlene has two clients to whom she is currently providing services.

Alesha – Group Facilitation Specialist



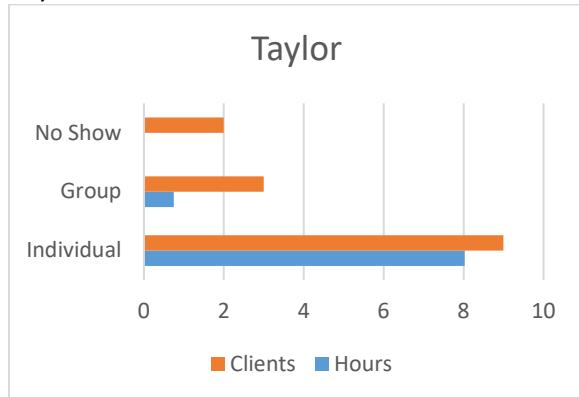
Alesha served 148 people through community groups for a total of 7.67 hours of group time. She had 18 people disclose human trafficking. Due to staffing changes, Alesha relocated her primary office to work out of the FJC. This also cuts down on some travel time for her as most of her groups are in lower Northumberland County. Alesha continues to be enrolled in a graduate social work program. Closed virtual support group is on hiatus for the summer due to decreased attendance and will resume in the late summer. Alesha's time spent outside of group has been consumed with completing data entry for all her group participants.

Morgan – Child Advocate



Morgan's caseload had some changes in June with closing children and taking on new ones. TeenU is on hiatus until school resumes in late summer. Group will likely resume in September after Labor Day. Morgan has assisted with hotline coverage as needed. Morgan has been developing a Child Advocate Counseling Manual and working to create a teen support group for survivors of sexual assault.

Taylor Ulmer - Counselor Advocate



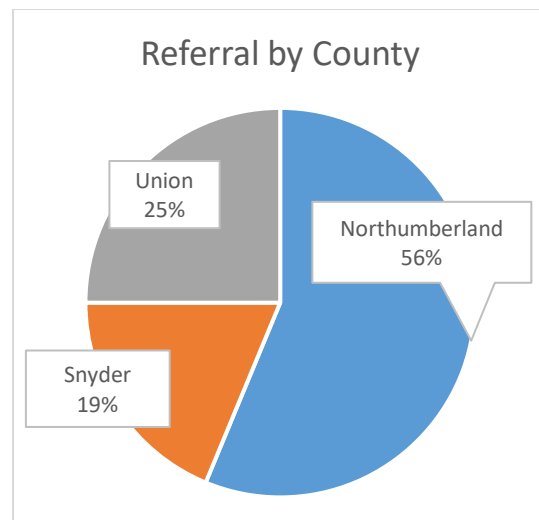
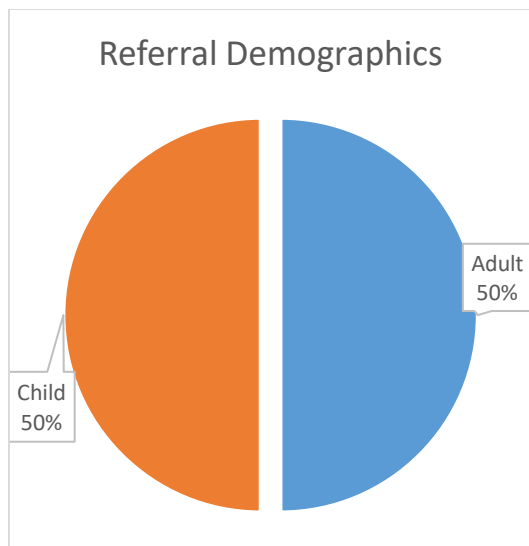
Taylor's caseload fluctuates during the month based upon the guests currently in the safe house. Outside of individual counseling, Taylor spent time looking for trainings to continue to enhance her counseling skills, assisting with hotline coverage, expanding group curriculum, and balancing her schedule with the child advocate to improve the attendance and frequency of safe house groups in both safe houses.

Vacant- Campus Advocate

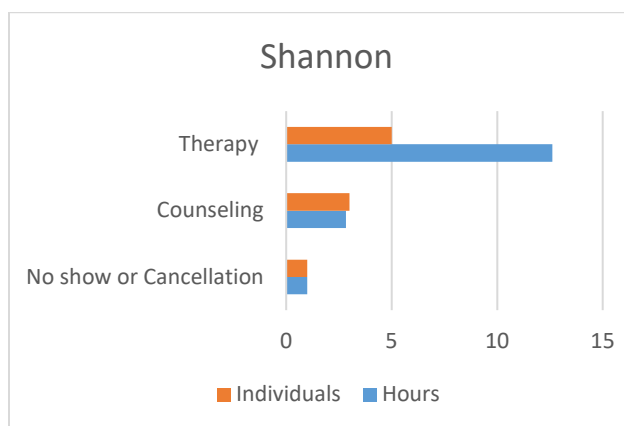
Albra Heineman's grant application was approved and the organization was awarded a \$10,000 grant to be used for programming to provide and enhance LGBTQIA services in Snyder County. The program would partner with Susquehanna University and the REC to provide programming and services to marginalized populations. Albra also spent much time working with the Title IX Coordinator, Christiana Paradis, and the VIP Center Director, Tyler Cox, on fall prevention and awareness programming at Susquehanna University. Unfortunately, Albra resigned from the organization abruptly on July 11, 2022.

July 2022

In July 2022, there were 16 referrals received, 8 children, and 8 adults. Of the child referrals, 4 were children in the safe house, and 4 were community-based referrals. Of the 8 adult referrals, 1 referral was for PREA, 4 were safe house guests, and the remaining 3 referrals were community-based adult referrals. All the counseling department staff attended a 4-day training hosted through the CMSU and Northumberland County BH/ID agencies called Practice Self-Regulation. Staff from several other departments also attended the training.

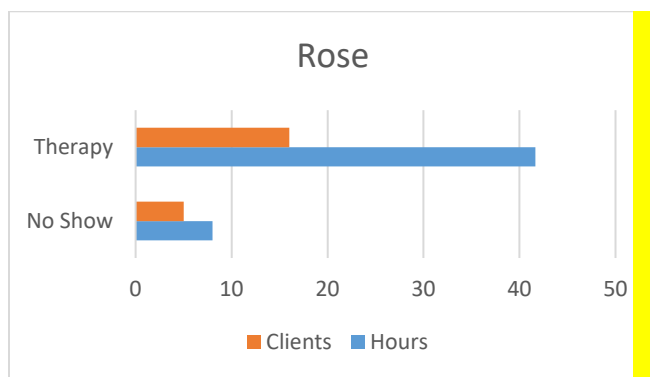


Shannon – Counseling Advocacy Coordinator/Programs Director



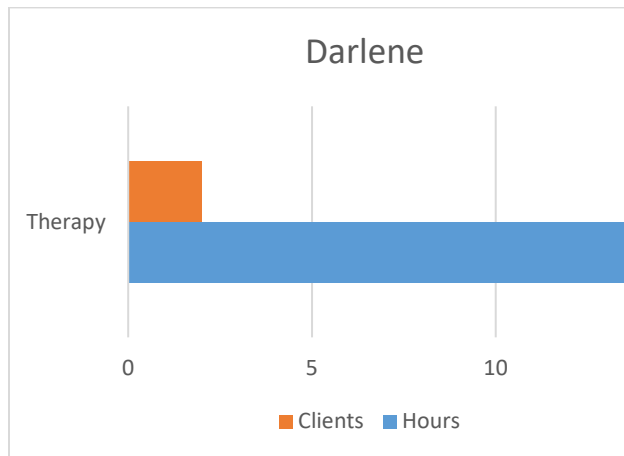
Shannon's time outside of counseling and therapy sessions was spent in the role of the program director and the daily tasks associated with that position.

Rose – Therapist



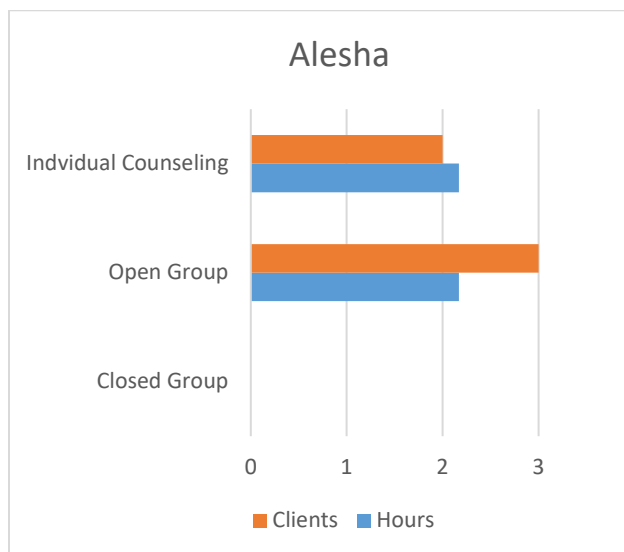
Rose's time outside of providing direct therapy was spent providing system advocacy and attending training.

Darlene – Contracted Therapist



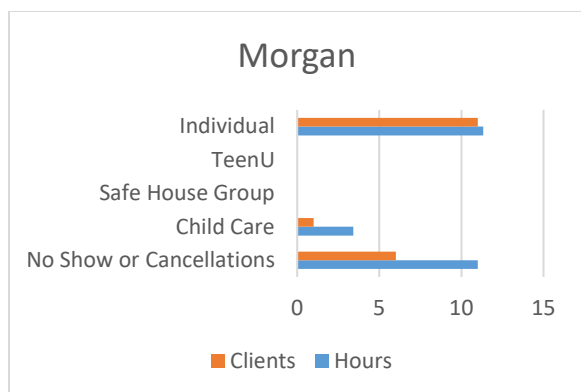
Darlene has two clients to whom she is currently providing services.

Alesha – Group Facilitation Specialist



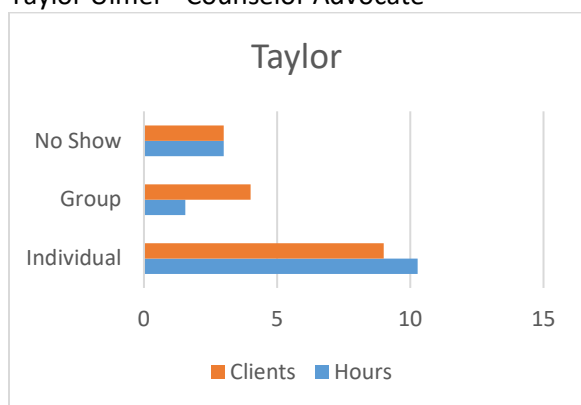
Alesha served 114 people through community groups for a total of 6.08 hours of group time. She had 16 people disclose human trafficking. Alesha continues to be enrolled in a graduate social work program. The closed virtual support group is on hiatus for the summer due to decreased attendance and will resume in the late summer. Alesha's time spent outside of the group has been consumed with completing data entry for all her group participants.

Morgan – Child Advocate



Morgan's caseload had some changes in July with closing children and taking on new ones. TeenU is on hiatus until school resumes in late summer. Group will likely resume in September after Labor Day. Morgan has assisted with hotline coverage as needed. Morgan has been developing a Child Advocate Counseling Manual.

Taylor Ulmer - Counselor Advocate



Taylor's caseload fluctuates during the month based on the guests currently in the safe house. Outside of individual counseling, Taylor spent time looking for training to continue to enhance her counseling skills, assisting with hotline coverage, expanding group curriculum, and balancing her schedule with the child advocate to improve the attendance and frequency of safe house groups in both safe houses.

Vacant- Campus Advocate

Shannon has worked with staff from Susquehanna University to gather information to share with staff to provide coverage for different events on campus. Programming is being scheduled to provide a support group on campus for the fall.

HOUSING REPORT

by Nina Blair, Housing Coordinator

Between the RRH Program and the PSH Program, we currently have (48) participants. (20) Adults and (28) Children. Out of these households, (20) are meeting their financial goals, (3) have gained employment, and (4) are currently working on educational courses. We have also been able to provide financial services in assisting these survivors and survivors within the community, with our various PCADV grants and Homes for Good monies.

The housing department has currently, accomplished obtaining and assisted in maintaining housing for all but (3) of the (20) households, in the Housing Programs we offer. Our advocates are currently working with these (3) newest intakes, to have leases in place by the end of the month.

Vacant Positions

RRH Advocates X's 2 – resumes received; interviews being scheduled

Rapid Rehousing

10 households currently enrolled
9 currently housed

2 Successful Exits

Permanent Supportive 10 households currently enrolled
8 currently housed

PCADV Relocation Funds/Homes for Good

Assisted 1 Survivor in relocating and obtaining/maintaining housing with Homes for Good Grant. Assisted 1 survivors with household goods/needs and moving needs.

PCADV Allstate Economic Justice Grant

Assisted 1 survivor with transportation (gas cards & Bus tickets),
Assisted 1 survivor with interview/employment clothing needs
Assisted 8 survivors with Financial Assistance – Grocery needs
Assisted 1 survivor with Housing needs – replacement items

DV Coordinated Entry

by Jennifer Taylor, DV Coordinated Entry Specialist

*DVCES was out on leave 2 weeks during this period; workflow reflects this

June 2022

- Partnership engagement:
 - By Name List case management calls (with Regional Managers, mainstream providers, and victim service providers) - 7
 - Regional Homeless Advisory Boards (Including CoC Veterans meetings) - 2
 - DV Coordinated Entry Planning partner meetings (with PCADV, United Way, and/or Capacity for Change) - 3
- Case management/direct services for Continuum of Care DV survivors ('caseload')
 - 14 clients

July 2022

- Partnership engagement:
 - By Name List case management calls (with Regional Managers, mainstream providers, and victim service providers) - 17
 - Regional Homeless Advisory Boards (Including CoC Veterans meetings) - 5
 - DV Coordinated Entry Planning partner meetings (with PCADV, United Way, and/or Capacity for Change, CoC DV committee) - 4
- Training Provided:
 - Domestic Violence training for Eastern CoC Access Sites (virtual)
 - 3 training sessions
 - 37 Individual attendees
 - Coordinated Entry and Cat 4 Clients training (virtual)
 - Housing Services Manager for Family Services, Inc.
- Case management/direct services for Continuum of Care DV survivors
 - 22 clients

EDUCATION REPORT

by Lisa Eroh, Outreach Coordinator

June 2022 Social Media Engagement Statistics

Transitions Google Profile report:

- 274 people visited our website from our profile (increase = 39%)
- 167 people reached out via telephone (increase = 39%)
- 1,143 profile views (increase = 4%)
- 421 searches (increase = 19%)

Facebook:

- 10,185 people reached (increase = 36.3%)
- 1,799 likes
- Age range with highest representation = 35-44 (86.8% women, 13.2% men)

Instagram:

- 135 people reached (increase = 36.4%)
- 391 followers
- Age range with highest representation = 35-44 (women), 25-34 (men) (84.8% women, 15.2% men)

Lisa Eroh, Outreach Coordinator

- Facilitated new staff training for Susan Parks (TLC intern/volunteer), Melissa Whistler (FJC Monitor), and Allie Holmes (Residential Services Coordinator)
- Provided counseling services to two (2) individuals
- Assisted with auction solicitation, set-up, and the night of the event
- Completed Level II training for volunteers at USP Allenwood
- Met with Campus Advocate to discuss ways that the Education Team can assist with activities at Susquehanna University
- Attended opening session of PCADV/PCAR Summer Prevention Summit
- Continued to review resumes for the vacant Education Specialist position and scheduled two interviews

Heather Shnyder, Health Systems Training Coordinator

- Attended the Human Trafficking Response Team meeting
- Hosted an information table at the SV Women's Energy Network
- PCADV-Health Cares About DV Session 1 with Medical Advocates
- Completed the PCADV-Measuring Outcomes training
- Assisted with auction set-up as well as the night of the event
- Led new staff medical advocacy training with Allie Holmes, the new Residential Service Coordinator
- Attended the PCADV/PCAR Summer Prevention Summit

Nicole Yeager, Education Specialist

- Presented three (3) programs to the Milton YMCA
- Created and sent out a newsletter focusing on the auction
- Held four (4) counseling with a teen client
- Attend the PCADV/PCAR Summer Prevention Summit
- Created and published 18 posts on Facebook and Instagram
- Presented Sportsmanship Program at the Miller Center
- Attended Riverhawk Days at Susquehanna University
- Took part in the Hidden Creek Campground Craft Fair

Jolene Nickel, Education Specialist

- Provided programming to children at the YMCA Miller Center (Lewisburg) and YMCA (Sunbury)
- Took part in a variety of summer camps at the REC, Donald Heiter Center, and the CSIU 5-star program

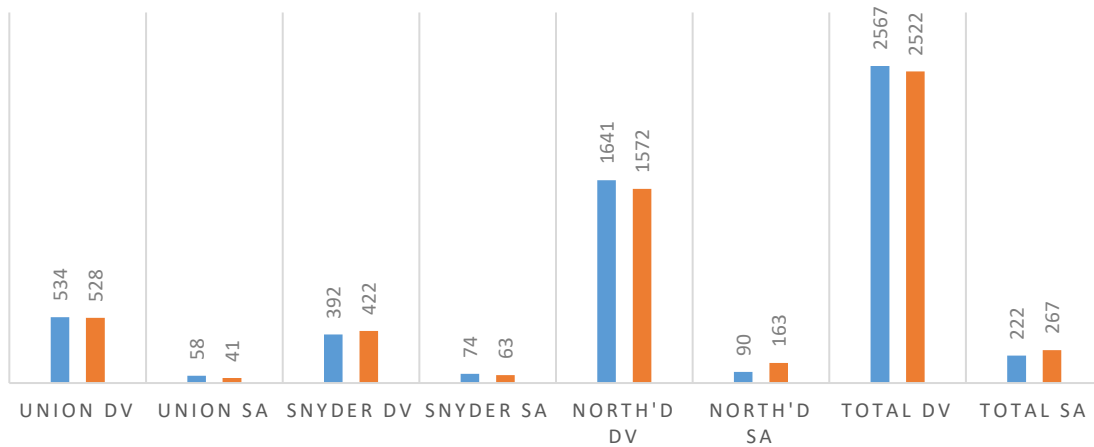
- Met with parents from the Mifflinburg Supporting All Students program
- Scheduled an in-service training for staff at Northumberland County Early Headstart
- Attended the Hidden Creek Campground Craft Fair
- Met with Amy Wehr, School Board member from Mifflinburg School District to discuss programming and effective communication with administration and parents
- Met with Jeremy Hoffman, Mifflinburg YMCA, to discuss bringing Teen U to that location

To check out more of what is happening with the Transitions of PA team, check out our website and social media accounts by clicking on the icons below.

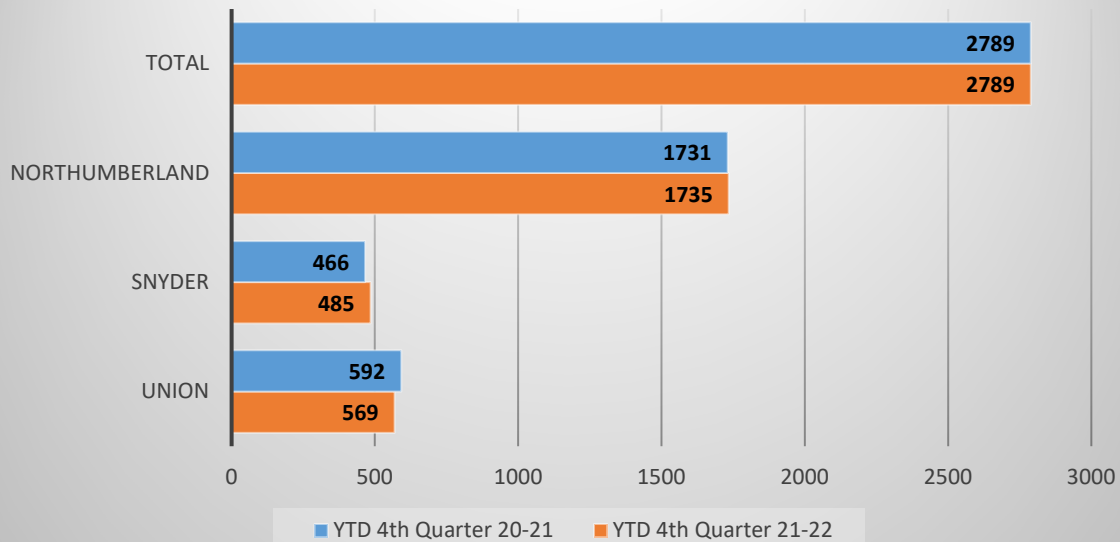


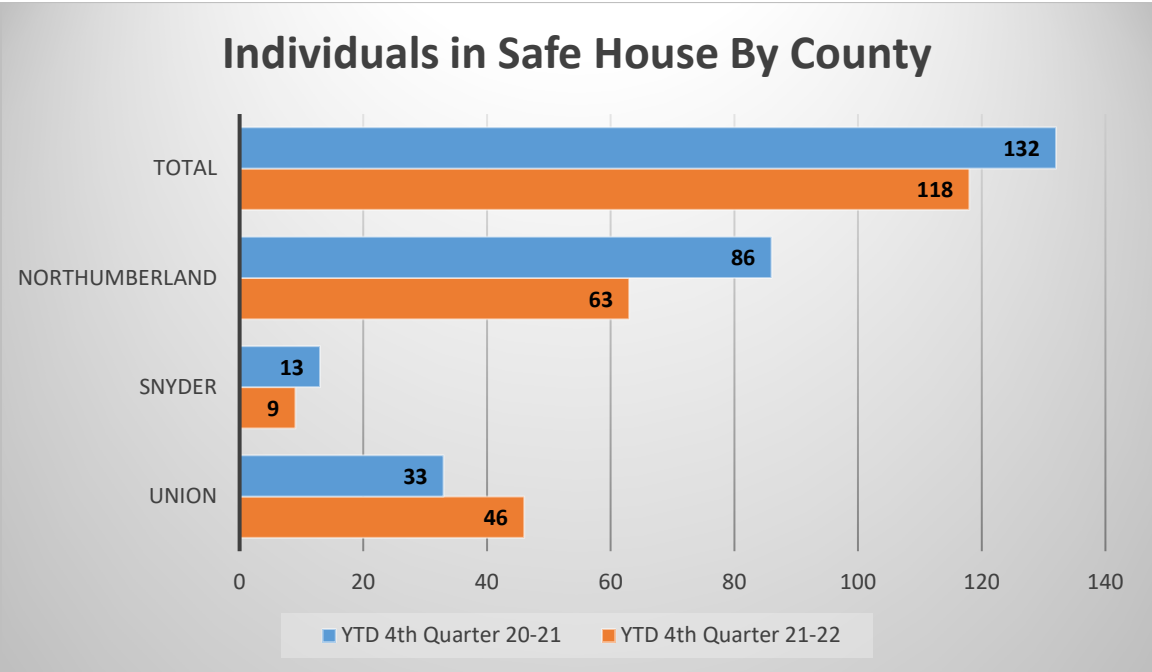
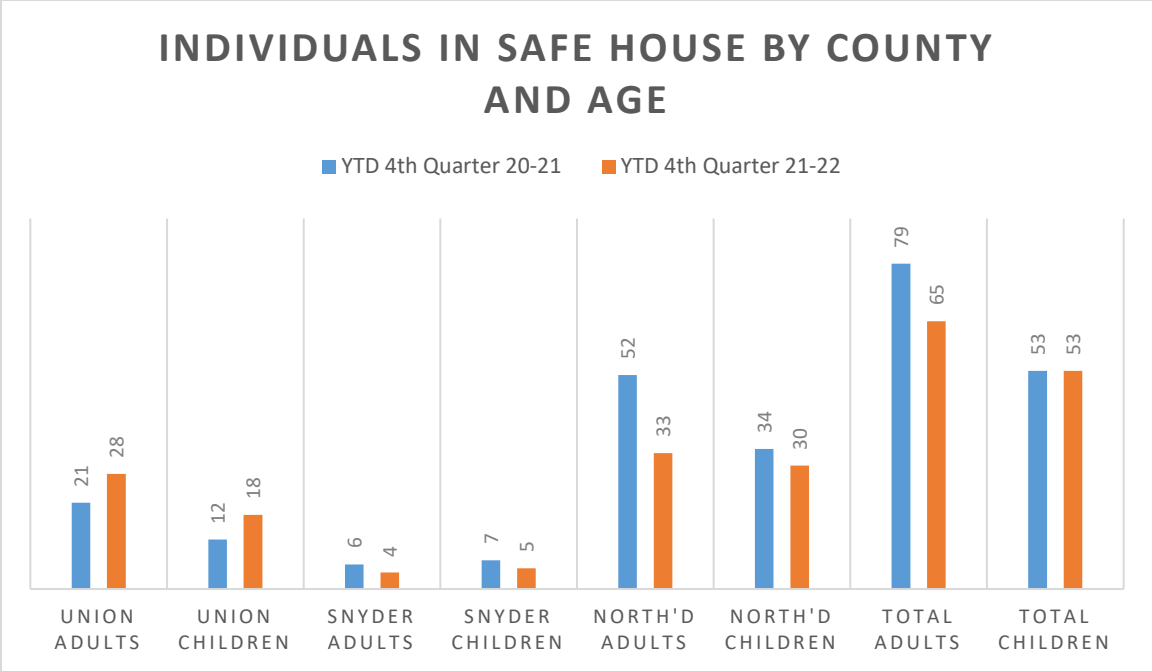
HOTLINE CALLS BY COUNTY AND VICTIMIZATION

■ YTD 4th Quarter 20-21 ■ YTD 4th Quarter 21-22

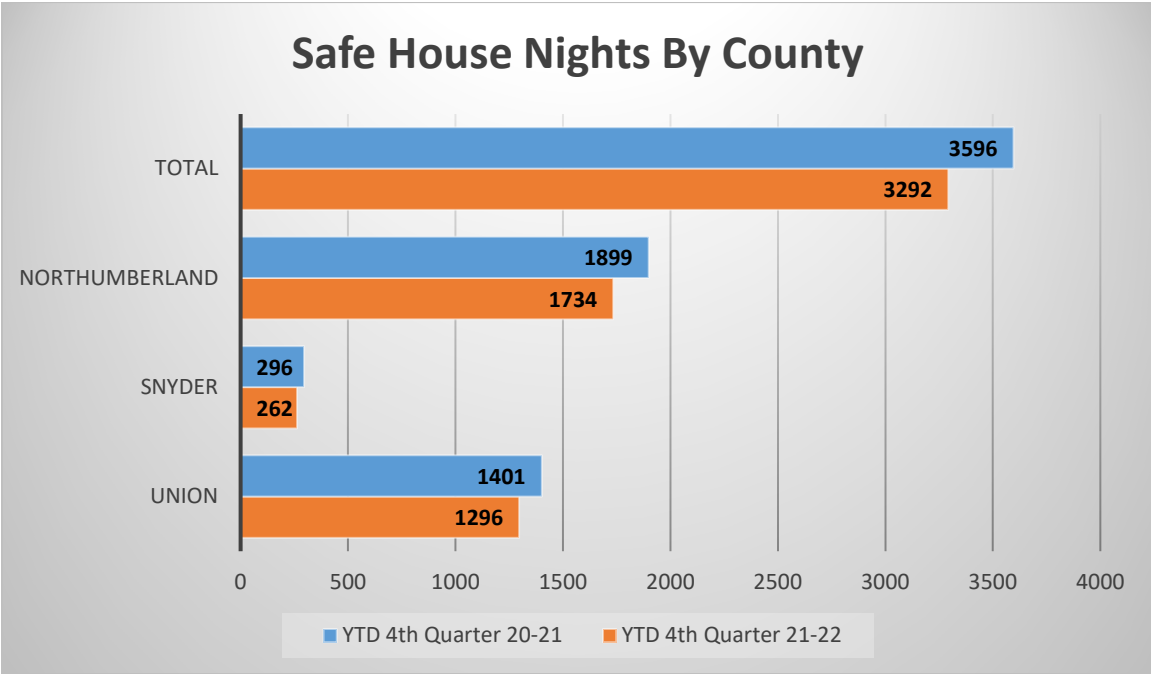
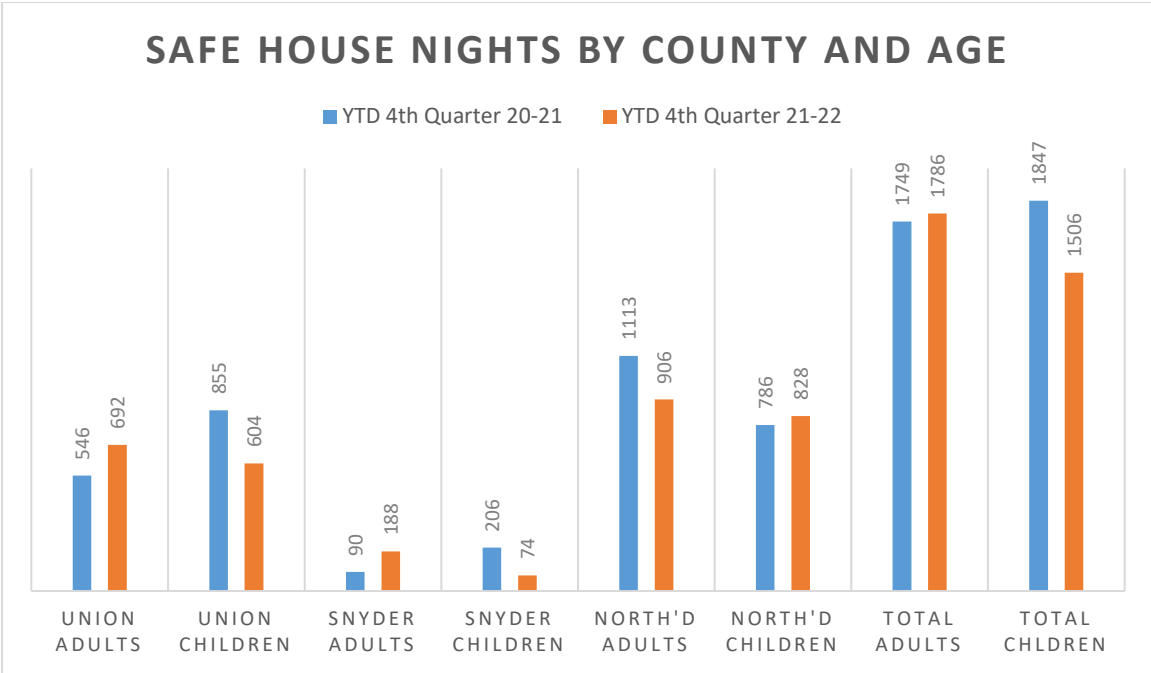


Hotline Calls by County

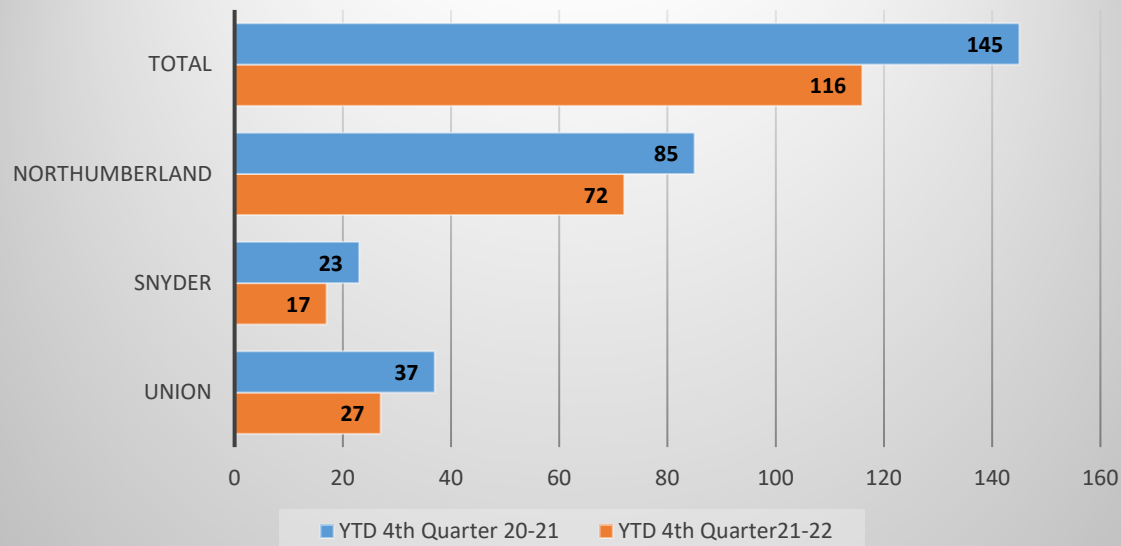




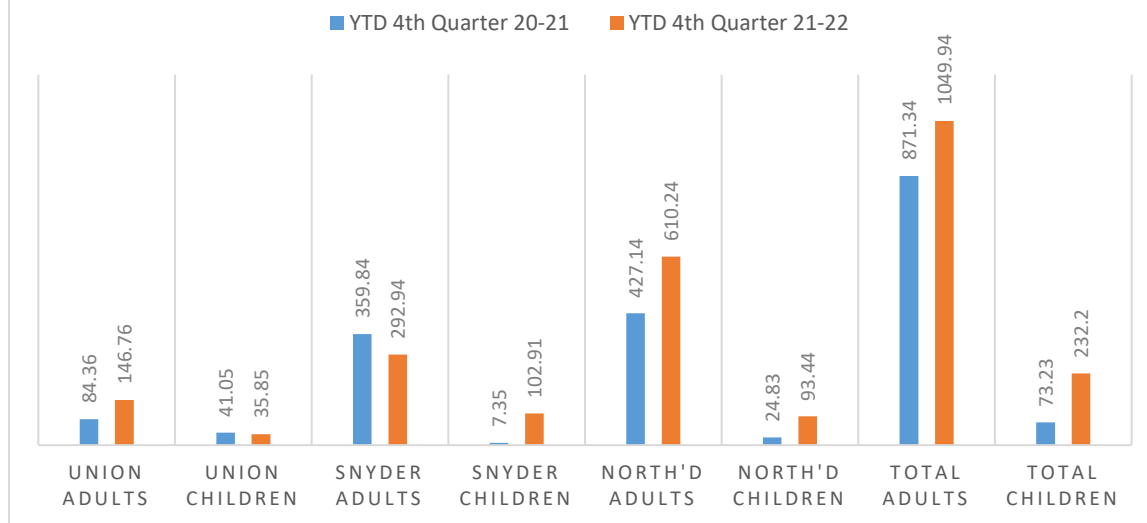
We increased the number of people served in safe house by 20.5%.



Filings for Protection Orders

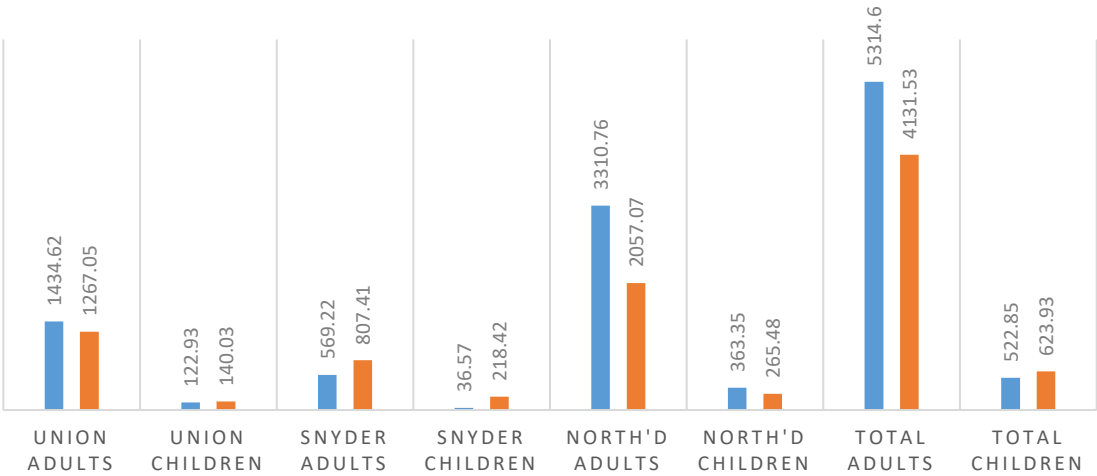


SEXUAL ASSAULT COUNSELING HOURS BY COUNTY AND AGE



DOMESTIC VIOLENCE COUNSELING HOURS BY COUNTY AND AGE

■ YTD 4th Quarter 20-21 ■ YTD 4th Quarter 21-22





LOCATION: Rippon Home

MEMBERS PRESENT: Sheri Rippon, Mae-Ling Kranz, Sabra Karr, Amanda Gaynor, Elisa Grandizio, Leslie Rippon, Tracy Strosser

MINUTES TAKEN BY: Tracy Strosser

TOPIC	DISCUSSION	ACTION
Review Numbers	Average Sponsorship \$1316.00	Reach out to Sponsors between now and November for a commitment to sponsor next year's event.
Discuss areas for improvement/things that worked well.	<p>Improvements needed:</p> <ul style="list-style-type: none"> • We ran out of food. • More substantial food items are needed. • No signature drink is needed. • Not enough items for the older generation. • Exclusive Silent Auction Items for ticket holders. • Alcohol items in person. • Dim the lights a bit for a better atmosphere. • Be clearer with the live auction/raise the paddle and flow so people know how to spend their money. • Flower sales need to be announced more for better response. • We need more options for people to buy and donate more. • Add \$250 level to Raise the Paddle/ end the night with \$100 Raise the Paddle. • Look for someone to be a matching sponsor for a large amount. • Include Wine Balloon or Wine event for next year. • 4 or 6 staff members for check-in, 2 for programs, and 1 floater. • Have people walk attendees to their tables (Board Members). • Staff Member keeping the line moving to the 	

	<p>next available computer for check-ins.</p> <ul style="list-style-type: none"> • More reminders about check out. • Dessert Dash: more people to set up. • Look for one high-level sponsor. • Double check the Dessert Dash final numbers. <p>Worked well:</p> <ul style="list-style-type: none"> • Great layout. • The flowers were beautiful. • \$50,000 in sponsorships is a great goal for next year. • The raffle was a great asset for cash. • People seemed happy with the event. 	
Review timeline for next year's event.	The committee decided to begin preparations for Auction 2023 in September in concurrence with the timeline.	
Theme Ideas	After some discussion for next year's theme, the committee decided on: <i>The Time is Now!</i>	<p>This theme will carry through the entire year and tie into our annual marketing.</p> <p>Begin the search for timepieces for Auction 2023.</p>
<p>Next Meeting Date: September 14, 2022</p> <p>Location: TBA</p>		



**FINANCE COMMITTEE
MEETING MINUTES**

DATE: 06/27/2022 **TIME:** 3:30 p.m. **LOCATION:** Zoom

MEMBERS PRESENT: Ed Sigl, Toni Byrd, Helen Nunn, Mary Louise Schweikert, Mae-Ling Kranz, Aquene Prindle and Jan McGrath

PRESENTED BY: Ed Sigl

MINUTES TAKEN BY: Jan McGrath

TOPIC	DISCUSSION	ACTION
1) John Link from Baker Tilly presented the audit planning for FY 22 – 23	The presentation included the names of the engagement team, the scope of the audit, the timeline, required communication, area of emphasis, audit plan, and accounting and auditing updates.	
2) Dashboard, financials, and narrative for May 2022 and year-to-date were reviewed.	Financials were again in line with previous months and doing well.	
3) Auction numbers	Mae-Ling reported that the auction will net over \$100,000 but we are still doing the final expenses.	



TIAC MEETING
Minutes

DATE: July 12, 2022

TIME: 3:30 PM

LOCATION: [ZOOM Meeting Link](#)

MEMBERS PRESENT: D. Toni Byrd, Bob Kallin, Marvin Rudnitsky, Helen Nunn, Mary Louise Schweikert, Janet McGrath

ABSENT: Ed Sigl

PRESENTED BY: D. Toni Byrd

MINUTES TAKEN BY: Mae-Ling Kranz, CEO

TOPIC	DISCUSSION	ACTION
Review of June 30, 2022, Vanguard Statement <ul style="list-style-type: none">April, May, and June statements attached are for reference. Next Meeting: October 11, 2022	<ul style="list-style-type: none">Approximately 16% loss since the beginning of the calendar year.No need to withdraw any funds.Asset Mix is on schedule.Wellington dividends are sweeping into Money Market.Money Market earnings themselves are reinvesting.Committee would like dividends and capital gains to reinvest automatically into Wellington and not into Money Market Settlement.	<ul style="list-style-type: none">Mae-Ling will call Vanguard to figure out how to set up an automatic reinvestment from the Wellington dividend back into the Wellington fund.Move the balance of the Money Market into an investment of the Wellington Fund.7/13/2022 – Mae-Ling spoke with a Vanguard representative and requested the following changes be made:<ol style="list-style-type: none">Transfer of \$5961.30 from Money Market (Settlement Fund) into Wellington Admiral Fund – VWENX. Transaction confirmation: V140479646Schedule for automatic reinvestment of dividends and capital gains from VWENX back into VWENX. <u>2022 Meeting Dates:</u> October 11, 2022 @ 3:30pm via Zoom <u>2023 Meeting Dates:</u> January 10, 2023 @ 3:30pm via Zoom April 11, 2023 @ 3:30pm via Zoom July 11, 2023 @ 3:30pm via Zoom October 10, 2023 @ 3:30pm via Zoom

transitions
FINANCE COMMITTEE
Meeting Minutes

DATE: 07/25/2022

TIME: 3:30 p.m.

LOCATION: Zoom

MEMBERS PRESENT: Ed Sigl, Toni Byrd, Helen Nunn, Mae-Ling Kranz and Jan McGrath

PRESENTED BY: Ed Sigl

MINUTES TAKEN BY: Jan McGrath

TOPIC	DISCUSSION	ACTION
1) The vote to move 3 accounts to FNB passed.	Transitions will receive higher interest on money market accounts and no service charge on an account that was charged service at M&T Bank.	Mae-Ling will meet with bank officials to move accounts to FNB.
2) Dashboard, financials and, narrative for June 2022 and year-to-date were reviewed.	Income was in line with last year. Health care did go up 15% but comparing year-end numbers to the audited budget for 21 – 22 everything looked ok.	



PERSONNEL
COMMITTEE
Meeting Agenda
[Meeting Link](#)

DATE: 08/17/2022

TIME: 3:00 pm

LOCATION: Zoom

MEMBERS PRESENT: Helen Nunn, Mary Louise Schweikert, Mae-Ling Kranz, Heather Over

PRESENTED BY: Helen Nunn

MINUTES TAKEN BY: Heather Over

TOPIC	DISCUSSION	ACTION
Discuss Hiring Concerns.	Heather O. reviewed experiences with staff turnover and the difficulty in filling open positions.	Helen will reach out to Toni Byrd and Stacey Pearson-Wharton to review bonus proposals and gather input.
<ul style="list-style-type: none">• Sign on Bonus	Heather O. and Mae-Ling proposed two new bonus programs to attract talented candidates who will be more likely to stay for at least one year.	Upon approval of Toni and Stacey, Personnel Committee will present to the Board at the meeting on August 23, 2022.
<ul style="list-style-type: none">• New Employee Referral Incentive	Sign-On Bonus for new employees at the following rate: Tiered based on the salary schedule (Advocate level - \$2000; Specialized - \$2500; Coordinator - \$3000; Director - \$3500). Bonus will be allocated at 1 month, 6 months, and 12 months.	
Next Meeting: TBD	Referral Bonus for existing employees who refer candidates who stay with the organization for 6 mo. and 12 mo. (\$250 at 6 months and \$250 at 12 months for referring employee) Mary-Louise and Helen approved the proposal.	