

THE A-TEAM
RCAC Regional Financial Peer Group
10/27/2022 10:00 AM PST



Welcome! Chatbox Moderator: Nancy Jacobsen
Facilitator: Samantha Bowley sbowley@rcac.org

Region Happenings:

- **new item! Before we begin, review agenda for additional topics that participants would like to add**
- **Financial Toolkit – it's on RCAC's website, let's review!** <https://www.rcac.org/housing/mutual-self-help-housing/self-help-housing-resources-2/> *group reviewed*
- **Review A-TEAM Evaluations from end of first year** *group reviewed details, accomplishments and evaluation of last fiscal year's A-TEAM activity, overall positive feedback, instituting a few suggestions around meeting times and agenda content*
- **Self-Help Employees Orientation** new & refreshed version planned for Nov/Dec – (Quarterly Schedule: Feb, May, Aug, Nov) **11/30/22 WEDS 10 to 11:30 AM**
- **Reminder: Anne Baker's Personalized Software Training for Self-Help grantees** one-on-one & small group, at mutually agreeable calendar date/time (Adobe Acrobat Pro, Microsoft Outlook, Microsoft Word, Microsoft Excel, Desktop Basics, Microsoft Office 365, Microsoft OneDrive, Microsoft PowerPoint, Microsoft Forms, or Microsoft Teams)
- **Group Discussion:**
 - New Schedule for A-TEAM meetings *we want to accommodate all the grantees region-wide, trying to stay on a central day (Thursday was most popular on evaluation responses, though some suggest Wednesday is better), but to allow for participation across time zone we will still need to juggle some mornings/some afternoons*
 - FY 22/23 Goals for the group *reviewed below in order of priority, group was in agreement but added a few other potential items (below in red)*
 - **A Really Big Announcement!** *We will be planning a 1 or 2 day conference on FISCAL RESPONSIBILITIES OF MUTUAL SELF HELP GRANTEES; dates and logistics TBA; we will look into providing CE credits for classes for CPAs and other fiscal staff*

Goals for FY22/23:

SF 425 Close Out - estimated Nov 2022

Financial Policies & Procedures workgroup - estimated Jan-Apr 2023

1944-I Compliance Training - estimated May 2023

Budget Vs. Actual & Other Financial Reporting - estimated Jul 2023

Fiscal Sections of 523 Application - estimated Aug 2023

Processes & Internal Controls - FY23/24

Others?

-SF 270 instruction (Anne Baker reminded the group that there is an article on "how to" in previous Self-Help Builder newsletter, Samantha will look at adding that to the Financial Toolkit online @ RCAC.org

-Effective budgeting was suggested as training topic (especially for salaries, COLA in current economic climate, inflation, cost of materials, etc.)

-Accounting for Reserved Liabilities (vacation, taxes, etc)

HOT Topics on the Back Burners:

- It's a New Year for us! Any burning issues??? (for next meeting, any topics for the agenda the participants would like to add?)
- <https://www.livestrong.com/aboutus/> new item!
- Shelly Baligad, Loan Specialist, Hawaii Island Community Development Corporation – SH Financial Tip of the Month! (show & tell) new item! *Shared HICDC's stamp for coding accounts and recording approval, and the PDF Dynamic Stamp (editable) that 502 bookkeepers can use to show required allocation on 502 family builders back-up/invoices – you can ask Anne Baker, RCAC abaker@rcac.org if you are interested in exploring how to use this or other tech tools in her one-on-one/small group trainings for grantees!*

Next A-TEAM Meeting: scheduled for ~~Thursday 12/8/22 10 AM~~ apologies for the change, but schedule conflict requires change to Weds 12/7/22 @ 1 PM (schedule accommodation for the holidays)

Other Trainings/Resources:

- [Quickbooks Made Easy 3-Day Fundamentals QB Desktop Users](#) starts Nov 1st 2022
- [Webinar: How to Examine Your Financials as You Round Out the Year](#) Free! Nov 17, 2022
- [How to Write a Grant: A Certification With the Grant Doctor](#) Oct 31st 2022 (self-paced option)
- [HAC OCTOBER NEWSLETTER!](#)

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A dynamic stamp consists of the image of the stamp—in our case above, the “Approved” text and its green box—and a text form field with JavaScript that enables you to create the dynamic information—here, it’s Shirley’s name and the date and time.

Even though they use JavaScript, dynamic stamps are pretty easy to create in a [PDF Editor](#) such as Foxit PDF Editor. That’s because Foxit PDF Editor does all the hard work for you and, once created, the stamp will pull information directly from your system.

Here’s what you do:

1. Choose **Comment > Stamps > Create > Create Custom Dynamic Stamp...**
2. Choose a stamp template from the left list or create your own stamp template from an image file.
Choose a category from drop-down menu or name a new one, then name the stamp.
3. Specify Font, Font Size and Font Color. Drag the Stamp Size slider to change stamp size when Font Size is set as Auto.
4. From the Stamp Text option:
 - Type the text that you want to show on the stamp in the **Stamp Text** field directly.
 - Next, choose <author name>, <date and time>, <date>, or <author name, date and time> to add the current user, date, and time of your system to the stamp. (When you add the date and time, or date, Foxit PDF Editor will read the date format from your system and apply it to the stamp you created.)
 - Click <Custom values when stamp is added> to create your custom dynamic stamp to invoke a prompt window for users to input information while adding a stamp in PDF file. If you select this option, define the Field Name and Example in the pop up window, and click **OK** to add it to the custom dynamic stamp. We recommend to set Font Size as Auto so that the custom values you added in the stamp will be adjusted automatically.
5. You can instantly adjust the added content to fit your needs when you preview current stamp on the right top preview pane.
6. Click **OK**.