

From: [Crystal Geathers](#)
To: [_STO - Appropriated Contributions](#)
Subject: [External] Re: quarterly report
Date: Wednesday, April 30, 2025 9:58:56 PM
Attachments: [Outlook-znahsh44.png](#)
[Outlook-vr3ao3wz.png](#)
[Outlook-2meeogj5.png](#)
[Outlook-0u1cp2rr.png](#)
[FY25 1st Quarterly Expenditure Report.pdf](#)
[FY25 1st Quarterly Expenditure Report.xlsx](#)

Please refer to the updated quarterly report.

From: Crystal Geathers <cgeathers@charlestandiocese.org>
Sent: Monday, April 21, 2025 10:09 AM
To: STO.Appropriated.Contributions@sto.sc.gov <STO.Appropriated.Contributions@sto.sc.gov>
Subject: quarterly report

Please see the attached document for Catholic Charities of SC

 [FY25 1st Quarterly Expenditure Report.xlsx](#)

Crystal Geathers, M.Th.
Grants Specialist

 [FY25 1st Quarterly Expenditure Report.xlsx](#)



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www.charitiessc.org | www.charlestandiocese.org
cgeathers@charlestandiocese.org
843.494.2429 |
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State of South Carolina Contribution Expenditure Report

This form is designed to collect the quarterly and annual expenditure reports required by South Carolina in accordance with Proviso 117.21 of the appropriations act and Executive Order 2022-19. This form must be submitted to the state agency that is providing the contribution to the designation organization at the end of year quarter and by June 30, 2025.

Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
\$100,000	X220 - Aid to Subdivisions - Treasurer	Next Level Services and Getting Ahead Program

Organization Information	
Entity Name	Catholic Charities of SC
Address	901 Orange Grove Rd
City/State/Zip	Charleston, SC 29406
Website	https://charitiessc.org
Tax ID#	57-0314369
Entity Type	Nonprofit Organization

Reporting Period	
Reporting Period	Quarter 3: January 1, 2025 - March 31, 2025

Organization Contact Information	
Name	Crystal Geathers
Position/Title	Grants Specialist
Telephone	8433180443
Email	cgeathers@charlestandioocese.org
Secondary Organization Contact Information	
Name	Rhett Young
Position/Title	Executive Director
Telephone	8435315570
Email	ryoung@charlestandioocese.org

Accounting of how the funds have been spent:							
Description (Attach additional detail for subgrantees and affiliated nonprofits)	Budget	Expenditures					Balance
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total	
Salaries	\$60,000.00			\$7,500.00		\$7,500.00	\$52,500.00
Direct Assistance to Individuals	\$31,600.00			\$2,456.00		\$2,456.00	\$29,144.00
Supplies	\$4,000.00			\$892.05		\$892.05	\$3,107.95
Meeting Expenses	\$4,000.00			\$454.99		\$454.99	\$3,545.01
Guide Training	\$400.00			\$250.92		\$250.92	\$149.08
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
Grand Total	\$100,000.00	\$0.00	\$0.00	\$11,553.96	\$0.00	\$11,553.96	\$88,446.04

Explanation of any unspent funds (to be provided only if unspent funds remain at the end of the fiscal year) :

Expenditure Certification
The Organization certifies that the funds have been expended in accordance with the Plan provided to the Agency Providing the Distribution and for a public purpose.

Crystal Geathers
Signature
Crystal Geathers
Printed Name

Grants Specialist
Title
4/15/2025
Date

**SOUTH CAROLINA OFFICE OF THE STATE TREASURER
CONTRIBUTION EXPENDITURE REPORT**

INSTRUCTIONS

Below are details about the various sections of the contribution expenditure report that is due quarterly as well as some answers to frequently asked questions.

- Contribution Information
 - This section should match what was listed on the disbursement request form your organization submitted.
 - The State Agency Providing the Contribution should match what is listed in Proviso 118.20.
- Organization Information
 - This section should match what was listed on the disbursement request form your organization submitted.
- Organization Contact Information and Secondary Organization Contact Information
 - This section should match what was listed on the disbursement request form your organization submitted unless the contacts need to be updated.
 - If updates are needed, please provide the new contact information in this section.
- Reporting Period
 - This represents the period that the expenses occurred.
 - Please select an option from the drop-down menu.
- Accounting of how the funds have been spent:
 - Description
 - This section should match what was listed on the disbursement request form your organization submitted unless you are able to provide additional details than what was originally submitted. If detailed information is available, it is preferred.
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 - This section should match what was listed on the disbursement request form your organization submitted.
 - Over time, organizations have had to move funds between budget lines due to a change in need for certain areas. This is allowable as long as the total budget matches what was awarded.
 - Expenditures
 - The total amount for each budget line that was spent during the quarter.
 - If no expenses occurred for a specific budget line during a quarter, please put a zero.
 - Blank columns will lead us to believe that your organization still needs to input data.
- Explanation of any unspent funds
 - This section will only need to be completed on the Q4 report each fiscal year until the funds are fully spent.
- Expenditure Certifications
 - The person who signs this section should be the individual that the organization chooses as the certifier that the information provided is accurate.

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Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
\$100,000	X220 - Aid to Subdivisions - Treasurer	Next Level Services and Getting Ahead Program

Organization Information	
Entity Name	Catholic Charities of SC
Address	901 Orange Grove Rd
City/State/Zip	Charleston, SC 29406
Website	https://charitiessc.org
Tax ID#	57-0314369
Entity Type	Nonprofit Organization

Reporting Period	
Reporting Period	Quarter 3: January 1, 2025 - March 31, 2025

Organization Contact Information	
Name	Crystal Geathers
Position/Title	Grants Specialist
Telephone	8433180443
Email	cgeathers@charlestdiocese.org
Secondary Organization Contact Information	
Name	Rhett Young
Position/Title	Executive Director
Telephone	8435315570
Email	ryoung@charlestdiocese.org

Accounting of how the funds have been spent:							
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Grand Total	\$100,000.00	\$0.00	\$0.00	\$11,553.96	\$0.00	\$11,553.96	\$88,446.04

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Expenditure Certification
The Organization certifies that the funds have been expended in accordance with the Plan provided to the Agency Providing the Distribution and for a public purpose.

Crystal Geathers
Signature
Crystal Geathers
Printed Name

Grants Specialist
Title
4/15/2025
Date

From: [Crystal Geathers](#)
To: [_STO - Appropriated Contributions](#)
Subject: Re: [External] quarterly report
Date: Monday, April 28, 2025 9:36:59 AM
Attachments: [image001.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)

Hello,

I am new to completing this form. I have reached out to my colleagues to get this document completed correctly. I will resubmit it correctly.

Get [Outlook for iOS](#)

From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Friday, April 25, 2025 1:08:19 PM
To: Crystal Geathers <cgeathers@charlestandiocese.org>
Cc: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] quarterly report

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Crystal,

While reviewing the quarterly report that was submitted, I noticed a few areas that need to be updated.

- Contribution Information
 - The amount and purpose should match what was listed on the disbursement request form which is attached to this email.
- Reporting Period
 - This report is for quarter 3 so it should be selected from the drop-down menu when you click on the cell.
- Accounting
 - The budget section should be completed, and the total budget should match the amount awarded which will also be the amount in the Contribution Information section.
 - The amounts should be in the quarter that they occurred. If no amounts occurred during a quarter, then zeros should be in the column.

If you have any questions, please let me know.

Contribution Information							
Amount	State Agency Providing the Contribution	Purpose					
	X220 - Aid to Subdivisions - Treasurer						
Organization Information				Organization Contact Information			
Entity Name	Catholic Charities of SC	Name	Crystal Geathers				
Address	901 Orange Grove Rd	Position/Title	Grants Specialist				
City/State/Zip	Charleston, SC 29406	Telephone	8433180443				
Website	https://charitiessc.org	Email	cgeathers@charlestandiocese.org				
Tax ID#	57-0314369	Secondary Organization Contact Information					
Entity Type	Nonprofit Organization	Name	Rhett Young				
		Position/Title	Executive Director				
		Telephone	8435315570				
		Email	ryoung@charlestandiocese.org				
Reporting Period							
Reporting Period							
Accounting of how the funds have been spent:							
Description (Attach additional detail for subgrantees and affiliated nonprofits)	Budget	Quarter 1	Quarter 2	Expenditures Quarter 3	Quarter 4	Total	Balance
Getting Ahead curriculum books		\$1,200.00				\$1,200.00	-\$1,200.00
Getting Ahead Supplies		\$500.00				\$500.00	-\$500.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
Grand Total	\$0.00	\$1,700.00	\$0.00	\$0.00	\$0.00	\$1,700.00	-\$1,700.00
Explanation of any unspent funds (to be provided only if unspent funds remain at the end of the fiscal year):							

-Meg



Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

803-734-2658 | Meg.Romaniello@sto.sc.gov

From: Crystal Geathers <cgeathers@charlestdiocese.org>

Sent: Monday, April 21, 2025 10:10 AM

To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>

Subject: [External] quarterly report

Please see the attached document for Catholic Charities of SC

 [FY25 1st Quarterly Expenditure Report.xlsx](#)

Crystal Geathers, M.Th.

Grants Specialist

 [FY25 1st Quarterly Expenditure Report.xlsx](#)



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Cc: [_STO - Appropriated Contributions](#)
Subject: RE: [External] quarterly report
Date: Friday, April 25, 2025 1:08:25 PM
Attachments: [image001.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)
[6 - Catholic Charities - Next Level Services and Getting Ahead Programs Original Submission.pdf](#)

Hi Crystal,

While reviewing the quarterly report that was submitted, I noticed a few areas that need to be updated.

- Contribution Information
 - The amount and purpose should match what was listed on the disbursement request form which is attached to this email.
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If you have any questions, please let me know.

Contribution Information							
Amount	State Agency Providing the Contribution	Purpose					
	X220 - Aid to Subdivisions - Treasurer						

Organization Information		Organization Contact Information	
Entity Name	Catholic Charities of SC	Name	Crystal Geathers
Address	901 Orange Grove Rd	Position/Title	Grants Specialist
City/State/Zip	Charleston, SC 29406	Telephone	8433180443
Website	https://charitiessc.org	Email	cgeathers@charlestandioocese.org
Tax ID#	57-0314369		
Entity Type	Nonprofit Organization	Secondary Organization Contact Information	
		Name	Rhett Young
		Position/Title	Executive Director
		Telephone	8435315570
		Email	ryoung@charlestandioocese.org

Accounting of how the funds have been spent:							
Description <i>(Attach additional detail for subgrantees and affiliated nonprofits)</i>	Budget	Expenditures				Total	Balance
		Quarter 1	Quarter 2	Quarter 3	Quarter 4		
Getting Ahead curriculum books		\$1,200.00				\$1,200.00	-\$1,200.00
Getting Ahead Supplies		\$500.00				\$500.00	-\$500.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
Grand Total	\$0.00	\$1,700.00	\$0.00	\$0.00	\$0.00	\$1,700.00	-\$1,700.00

Explanation of any unspent funds (to be provided only if unspent funds remain at the end of the fiscal year):

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
 1200 Senate Street, Suite 214
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From: Crystal Geathers <cgeathers@charlestandioocese.org>
Sent: Monday, April 21, 2025 10:10 AM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
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State of South Carolina Request for Contribution Distribution

This form is designed to collect the information required by South Carolina in accordance with Proviso 117.21 of the appropriations act and Executive Order 2022-19. This form must be submitted to the state agency that is providing the contribution for the designated organization. The state agency providing the contribution should use this form to collect information from the designated organization. The information must be collected from the designated organization before the funds can be disbursed.

Contribution Information

Amount	State Agency Providing the Contribution	Purpose
\$100,000.00	X220 - Aid to Subdivisions - Treasurer	Supporting Next Level Services and Getting Ahead Programs

Organization Information

Entity Name	Catholic Charities of South Carolina
Address	901 Orange Grove Road
City/State/Zip	Charleston, SC 29407
Website	charitiessc.org
Tax ID #	51-0314369
Entity Type	Nonprofit Organization
Vendor #	7000247055

[Link to Search Vendor Number](#)

Organization Contact Information

Contact Name	Lydia Doyle
Position/Title	Executive Director
Telephone	706-338-2961
Email	ldoyle@charlestandiocese.org

Secondary Organization Contact Information

Name	Laura Trowbridge
Position/Title	Executive Assistant
Telephone	843-278-2976
Email	ltrowbridge@charlestandiocese.org

Plan/Accounting of how these funds will be spent:

Description	Budget	Explanation
Salaries	\$60,000.00	Two staff members who facilitate Getting Ahead and Next Level Services
Direct Assistance to Individuals	\$31,600.00	Stipends for participants' necessary supplies for the length of program
Supplies	\$4,000.00	Covers program materials such as books, t-shirts, etc. for participants
Meeting expenses - graduation, food, etc.	\$4,000.00	Program graduation costs and meals for program meetings
Guide training	\$400.00	Training for Getting Ahead staff prior to working with clients
Grand Total	\$100,000.00	

Please explain how these funds will be used to provide a public benefit:

Over the years, our offices realized that we were repeatedly serving the same clients for food, clothing, and showers. Knowing that some of these individuals wanted to move out of these cycles, but lacked the skills and support to do so, we began working with clients to help them break the cycles of poverty. We partner with many other nonprofit organizations and government agencies to create a network around the clients to help them on this difficult journey. This collaborative approach, helps clients know that they are not alone and that help is available to them if and when they need it. Giving people the tools and confidence they need to be self-sufficient benefits the entire community. These individuals have served as examples to their families and neighbors of how you can turn your life around. We've had the friends and relatives of past participants come through the programs after they see how their friend or loved one has thrived. Having fewer people in poverty and in need of ongoing assistance strengthens individuals and communities while easing the burden on resources that are often stretched too thin.

Organization Certifications

- 1) Organization hereby gives assurance that no person shall, upon the grounds of race, creed, color, or national origin, be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under any program or activity for which this organization is responsible.
- 2) Organization certifies that it will provide quarterly spending reports to the Agency Providing Contribution listed above.
- 3) Organization certifies that it will provide an accounting at the end of the fiscal year to the Agency Providing Contribution listed above.
- 4) Organization certifies that it will allow the State Auditor to audit or cause to be audited the contributed funds.

Lydia Doyle

Organization Signature

Executive Director

Title

Lydia Doyle

Printed Name

5-Dec-24

Date

Certifications of State Agency Providing Contribution

- 1) State Agency certifies that the planned expenditure aligns with the Agency's mission and/or the purpose specified in the appropriations act.
- 2) State Agency certifies that the Organization has set forth a public purpose to be served through receipt of the expenditure.
- 3) State Agency certifies that it will make distributions directly to the organization.
- 4) State Agency certifies that it will provide the quarterly spending reports and accounting received from the organization to the Senate Finance Committee, House Ways and Means Committee, and the Executive Budget Office by June 30, 2025.
- 5) State Agency certifies that it will publish on their website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 of the appropriations act.
- 6) State Agency will certify to the Office of the Governor that it has complied with the requirements of Executive Order 2022-19 by June 30, 2025.

*

Agency Head Signature

Date

Printed Name

***The undersigned is signing on behalf of the Office of the State Treasurer (STO) and the State Treasurer. Note that STO is not an agency as defined by Executive Order 2022-19 and therefore, is not subject to the requirements therein.**

This packet has been reviewed and is ready for approval and payment.

Reviewed by: _____

Reviewed by: _____

Governing Board and Executive Officer - Nonprofit Organizations Only

For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

Members of Your Organization's Governing Board	
Name	Board Position, if applicable
Most Rev. Jacques Fabre-Jeune, CS	Bishop of Charleston; President of the Board
Very Rev. Gregory Wilson	Vicar General; Chairman of the Board
Very Rev. D. Anthony Droze	Vicar General; Vice-Chair of the Board
Mr. Mike Munafo	Treasurer
Ms. Mavis Huger	
Mr. Jose Estevez	
Ms. Lindsey Vann	
Mr. Michael Acquilano	
Ms. Lydia Doyle	Executive Director


Your Organization's Executive Officer	
Name	Title

From: [Crystal Geathers](#)
To: [_STO - Appropriated Contributions](#)
Subject: [External] quarterly report
Date: Monday, April 21, 2025 10:10:05 AM
Attachments: [Outlook-znahsh44.png](#)
[Outlook-vr3ao3wz.png](#)
[Outlook-2meeogj5.png](#)
[Outlook-0u1cp2rr.png](#)

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**SOUTH CAROLINA OFFICE OF THE STATE TREASURER
CONTRIBUTION EXPENDITURE REPORT**

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Entity Type	Nonprofit Organization

Reporting Period	
Reporting Period	

Organization Contact Information	
Name	Crystal Geathers
Position/Title	Grants Specialist
Telephone	8433180443
Email	cgeathers@charlestandiocese.org
Secondary Organization Contact Information	
Name	Rhett Young
Position/Title	Executive Director
Telephone	8435315570
Email	ryoung@charlestandiocese.org

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						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
Grand Total	\$0.00	\$1,700.00	\$0.00	\$0.00	\$0.00	\$1,700.00	-\$1,700.00

Explanation of any unspent funds (to be provided only if unspent funds remain at the end of the fiscal year) :

Expenditure Certification
The Organization certifies that the funds have been expended in accordance with the Plan provided to the Agency Providing the Distribution and for a public purpose.

Crystal Geathers
Signature
Crystal Geathers
Printed Name

Grants Specialist
Title
4/15/2025
Date

From: [_STO - Appropriated Contributions](#)
To: [Lydia Doyle; ltrowbridge@charlestandiocese.org](#)
Cc: [_STO - Appropriated Contributions](#)
Subject: Quarterly Update Reminder for FY25 Appropriated Earmarks - Proviso 117.21
Date: Tuesday, April 1, 2025 4:10:47 PM

Hello,

Currently my reports show that your organization has funds left unspent from the FY25 Appropriated Earmarks. This is a reminder about your quarterly update that is due soon.

Please update and submit the quarterly report to us (STO.Appropriated.Contributions@sto.sc.gov) by the 15th of the month following the end of each quarter.

Q3 (ending 3/31/25) update due date: 4/15/25

If you have any questions, please do not hesitate to reach out to me.

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov

From: [_STO - Appropriated Contributions](#)
To: [Lydia Doyle; ltrowbridge@charlestandiocese.org](mailto:ltrowbridge@charlestandiocese.org)
Cc: [_STO - Appropriated Contributions](#)
Subject: FY25 Appropriated Contributions Payment Confirmation and Quarterly Expenditure Report Information
Date: Monday, January 27, 2025 9:36:30 AM
Attachments: [Appropriated Grants Letter - Catholic Charities - Next Level Services and Getting Ahead Programs.pdf](#)
[Quarterly Expenditure Report Instructions.pdf](#)
[FY25 Quarterly Expenditure Report template.xlsx](#)

Hello,

Please see attached for your payment confirmation letter.

I have also included your quarterly expenditure report spreadsheet that you will use as well as instructions.

Below is the schedule of when quarterly reports are due. Your first quarterly report will be due **April 15, 2025**.

Quarterly Update Schedule				
Time Frame	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30
Due Date	10/15	1/15	4/15	7/15

* Quarterly Update requirement continues until all funds have been spent.

Since funds are just being received, your organization may not have any expenditures to report. If that is the case, you will put zeros in the expenditure section with the quarters that had no expenses.

Please note that we must have separate quarterly expenditure reports per appropriation.

If you have any questions or issues with the spreadsheet, please do not hesitate to reach out.

Thank you,

Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov



THE HONORABLE CURTIS M. LOFTIS, JR.
State Treasurer

January 27, 2025

Lydia Doyle and Laura Trowbridge
Catholic Charities of South Carolina
901 Orange Grove Road
Charleston, South Carolina 29407

Dear Lydia Doyle and Laura Trowbridge:

Thank you for submitting the required documentation outlined in Budget Proviso 117.21 to receive funds from the Appropriations Act. A payment has been processed for \$100,000 representing your organization's appropriated contribution. You should receive a check (146335943) in the mail separately from this notification. In accordance with Budget Proviso 117.21, you will now need to submit quarterly updates on funds spent. A schedule has been provided below for your reference. Your first quarterly report will be due April 15, 2025.

Quarterly Update Schedule				
Time Frame	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30
Due Date	10/15	1/15	4/15	7/15

* Quarterly Update requirement continues until all funds have been spent.

The template for the quarterly reports is attached. If your organization has multiple appropriated contributions, each contribution will need a quarterly report. All completed reports should be submitted via email to STO.Appropriated.Contributions@sto.sc.gov.

Should you have any questions, please email me at the address above or call me at (803)734-2658.

Sincerely,

A handwritten signature in blue ink, appearing to read "Meg Romaniello".

Meg Romaniello
Accounting/Fiscal Manager II

SOUTH CAROLINA OFFICE OF THE STATE TREASURER CONTRIBUTION EXPENDITURE REPORT

INSTRUCTIONS

Below are details about the various sections of the contribution expenditure report that is due quarterly as well as some answers to frequently asked questions.

- Contribution Information
 - This section should match what was listed on the disbursement request form your organization submitted.
 - The State Agency Providing the Contribution should match what is listed in Proviso 118.20.
- Organization Information
 - This section should match what was listed on the disbursement request form your organization submitted.
- Organization Contact Information and Secondary Organization Contact Information
 - This section should match what was listed on the disbursement request form your organization submitted unless the contacts need to be updated.
 - If updates are needed, please provide the new contact information in this section.
- Reporting Period
 - This represents the period that the expenses occurred.
 - Please select an option from the drop-down menu.
- Accounting of how the funds have been spent:
 - Description
 - This section should match what was listed on the disbursement request form your organization submitted unless you are able to provide additional details than what was originally submitted. If detailed information is available, it is preferred.
 - Budget
 - This section should match what was listed on the disbursement request form your organization submitted.
 - Over time, organizations have had to move funds between budget lines due to a change in need for certain areas. This is allowable as long as the total budget matches what was awarded.
 - Expenditures
 - The total amount for each budget line that was spent during the quarter.
 - If no expenses occurred for a specific budget line during a quarter, please put a zero.
 - Blank columns will lead us to believe that your organization still needs to input data.
- Explanation of any unspent funds
 - This section will only need to be completed on the Q4 report each fiscal year until the funds are fully spent.
- Expenditure Certifications
 - The person who signs this section should be the individual that the organization chooses as the certifier that the information provided is accurate.

Completed forms should be emailed directly to STO.Appropriated.Contributions@sto.sc.gov.

At the end of each fiscal year, after Q4 reports are received, organizations that have funds remaining to be spent will receive an updated template for them to use for the next fiscal year. This updated report will include the balance of what was spent in the previous fiscal year to assist organizations with tracking the remaining balance of their funds.

**SOUTH CAROLINA OFFICE OF THE STATE TREASURER
CONTRIBUTION EXPENDITURE REPORT**

INSTRUCTIONS

Below are details about the various sections of the contribution expenditure report that is due quarterly as well as some answers to frequently asked questions.

- Contribution Information
 - This section should match what was listed on the disbursement request form your organization submitted.
 - The State Agency Providing the Contribution should match what is listed in Proviso 118.20.
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 - If updates are needed, please provide the new contact information in this section.
- Reporting Period
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 - Please select an option from the drop-down menu.
- Accounting of how the funds have been spent:
 - Description
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 - Budget
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 - Over time, organizations have had to move funds between budget lines due to a change in need for certain areas. This is allowable as long as the total budget matches what was awarded.
 - Expenditures
 - The total amount for each budget line that was spent during the quarter.
 - If no expenses occurred for a specific budget line during a quarter, please put a zero.
 - Blank columns will lead us to believe that your organization still needs to input data.
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 - This section will only need to be completed on the Q4 report each fiscal year until the funds are fully spent.
- Expenditure Certifications
 - The person who signs this section should be the individual that the organization chooses as the certifier that the information provided is accurate.

[Completed forms should be emailed directly to STO.Appropriated.Contributions@sto.sc.gov.](mailto:STO.Appropriated.Contributions@sto.sc.gov)

At the end of each fiscal year, after Q4 reports are received, organizations that have funds remaining to be spent will receive an updated template for them to use for the next fiscal year. This updated report will include the balance of what was spent in the previous fiscal year to assist organizations with tracking the remaining balance of their funds.



State of South Carolina Contribution Expenditure Report

This form is designed to collect the quarterly and annual expenditure reports required by South Carolina in accordance with Proviso 117.21 of the appropriations act and Executive Order 2022-19. This form must be submitted to the state agency that is providing the contribution to the designation organization at the end of year quarter and by June 30, 2025.

Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

Organization Information	
Entity Name	
Address	
City/State/Zip	
Website	
Tax ID#	
Entity Type	

Reporting Period	
Reporting Period	

Organization Contact Information	
Name	
Position/Title	
Telephone	
Email	
Secondary Organization Contact Information	
Name	
Position/Title	
Telephone	
Email	

Accounting of how the funds have been spent:							
Description (Attach additional detail for subgrantees and affiliated nonprofits)	Budget	Expenditures					Balance
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total	
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
						\$0.00	\$0.00
Grand Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Explanation of any unspent funds (to be provided only if unspent funds remain at the end of the fiscal year) :

Expenditure Certification
The Organization certifies that the funds have been expended in accordance with the Plan provided to the Agency Providing the Distribution and for a public purpose.

Signature

Printed Name

Title

Date

From: [_STO - Appropriated Contributions](#)
To: [Anna Kelley](#)
Cc: [_STO - Appropriated Contributions](#)
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, January 6, 2025 2:56:39 PM
Attachments: [Catholic Charities - Next Level Services and Getting Ahead Programs Original Submission.pdf](#)
[image004.png](#)
[image006.png](#)

Thank you, Anna! I have updated the form and attached a copy for your records.

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestandiocese.org>
Sent: Monday, January 6, 2025 11:32 AM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good morning Meg,

Supporting Next Level Services and Getting Ahead Programs covers it perfectly! Thank you very much.

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestandiocese.org
akelley@charlestandiocese.org | o: 843.261.0462 | c: 803.457.0888

***OUR MISSION:** The Chancery exists to serve the mission of the Bishop of Charleston to teach, sanctify, and govern the Catholic Church in South Carolina. Led by the Bishop, the Chancery supports the clergy, religious, and lay faithful in fulfilling the Great Commission given to us by the Lord Jesus (Mt 28:16-20).*

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From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Monday, January 6, 2025 11:15 AM
To: Anna Kelley <akelley@charlestandiocese.org>
Cc: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Hey Anna,

What I'm looking for is like a one sentence brief purpose. It could just be "Supporting Next Level Services and Getting Ahead Programs" if you wanted it to be.

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
[803-734-2658](tel:803-734-2658) | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestandiocese.org>

Sent: Friday, January 3, 2025 10:48 AM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good morning,

I hope you are doing well! I have this for how we intend to use the funds. Is this the correct information?

Over the years, our offices realized that we were repeatedly serving the same clients for food, clothing, and showers. Knowing that some of these individuals wanted to move out of these cycles, but lacked the skills and support to do so, we began working with clients to help them break the cycles of poverty. We partner with many other nonprofit organizations and government agencies to create a network around the clients to help them on this difficult journey. This collaborative approach helps clients know that they are not alone and that help is available to them if and when they need it. Giving people the tools and confidence they need to be self-sufficient benefits the entire community. These individuals have served as examples to their families and neighbors of how you can turn your life around. We've had the friends and relatives of past participants come through the programs after they see how their friend or loved one has thrived. Having fewer people in poverty and in need of ongoing assistance strengthens individuals and communities while easing the burden on resources that are often stretched too thin.

If this is not what you are looking for, please let me know. Thank you so much!

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestondiocese.org
akelley@charlestondiocese.org | o: 843.261.0462 | c: 803.457.0888

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From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Friday, December 20, 2024 4:23 PM
To: Anna Kelley <akelley@charlestondiocese.org>
Cc: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Hey Anna,

Could you send me the wording for the purpose section? I will add it to the document for you and send you a copy.

Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II
South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
[803-734-2658](tel:803-734-2658) | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestondiocese.org>
Sent: Thursday, December 5, 2024 3:17 PM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>

Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Lydia Doyle <LDoyle@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good afternoon,

Here is the request for contribution distribution form for Catholic Charities and their Getting Ahead and Next Level Services programs. Please let me know if there is anything additional that you need from us. Thank you so much for your help.

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestdiocese.org
akelley@charlestdiocese.org | 843.261.0462 ext. 1014

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From: Anna Kelley <akelley@charlestdiocese.org>
Sent: Monday, October 28, 2024 3:29 PM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>; Lydia Doyle <LDoyle@charlestdiocese.org>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Meg,

That is great news. We will try to have the documents completed and submitted well before June. I appreciate your help! Have a great week.

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestdiocese.org
akelley@charlestdiocese.org | 843.261.0462 ext. 1014

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From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Monday, October 28, 2024 2:41 PM
To: Anna Kelley <akelley@charlestdiocese.org>
Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>; Lydia Doyle <LDoyle@charlestdiocese.org>; _STO

- Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Hi Anna,

There is no deadline listed in the proviso, but we do prefer to have the funds issued before the end of the fiscal year which is in June.

-Meg

From: Anna Kelley <akelley@charlestdiocese.org>
Sent: Monday, October 28, 2024 2:03 PM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>; Lydia Doyle <LDoyle@charlestdiocese.org>
Subject: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good afternoon,

I appreciate you all resending these instructions. I missed your original email and I apologize for the delay. Would you please clarify when the deadline is to submit the allocation request? The Director of Catholic Charities of South Carolina is out of the office until next week so she will not be able to complete them until then. Would it be possible to submit them then? Thank you again for your patience with us!

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestdiocese.org
akelley@charlestdiocese.org | 843.261.0462 ext. 1014

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From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Monday, October 28, 2024 1:03 PM
To: Anna Kelley <akelley@charlestdiocese.org>
Cc: Michael Acquilano <macquilano@charlestdiocese.org>; _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: FY25 Appropriated Contributions Enrollment Packet

Hello,

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. Your organization was selected as one of those outside organizations. I have attached 2 files as part of your enrollment packet. Please read the Appropriated Funds Cover Letter first. There you will find important information regarding FY 2024-2025 reporting requirements and guidance on how to complete the Earmarked Appropriations Disbursement Request form. In order for funds to be disbursed to your organization, you will not only need to submit the Earmarked Appropriations Disbursement Request form but also be registered with the Secretary of State's ("SOS") Office and as a vendor with the State of South Carolina. Details on how to register with the SOS and as a vendor will be included in the attached letter. The registration with the SOS is required per Proviso 118.20.D, but it does not apply to governmental entities or entities created by statute.

All completed forms should be submitted to the STO - Appropriated Contributions email address listed below.

STO.Appropriated.Contributions@sto.sc.gov

In accordance with Executive Order 2022-19, STO is required to promptly make available for public review and inspection on our website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21. Below is the link to where the information will be available on our website.

<https://treasurer.sc.gov/about-us/transparency/earmark-transparency/>

If you have any questions, please do not hesitate to contact us.

Thank you,

Meg



Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

803-734-2658|STO.Appropriated.Contributions@sto.sc.gov



Contribution Information

Organization Contact Information	
Contact Name	Lydia Doyle
Position/Title	Executive Director
Telephone	706-338-2961
Email	ldoyle@charlestandiocese.org
Secondary Organization Contact Information	
Name	Laura Trowbridge
Position/Title	Executive Assistant
Telephone	843-278-2976
Email	ltrowbridge@charlestandiocese.org

Please explain how these funds will be used to provide a public benefit:

Organization Certifications

- ### Certifications of State Agency Providing Contribution

- *The undersigned is signing on behalf of the Office of the State Treasurer (STO) and the State Treasurer. Note that STO is not an agency as defined by Executive Order 2022-19 and therefore, is not subject to the requirements therein.**

Reviewed by:

Governing Board and Executive Officer - Nonprofit Organizations Only

For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

Members of Your Organization's Governing Board	
Name	Board Position, if applicable
Most Rev. Jacques Fabre-Jeune, CS	Bishop of Charleston; President of the Board
Very Rev. Gregory Wilson	Vicar General; Chairman of the Board
Very Rev. D. Anthony Droze	Vicar General; Vice-Chair of the Board
Mr. Mike Munafo	Treasurer
Ms. Mavis Huger	
Mr. Jose Estevez	
Ms. Lindsey Vann	
Mr. Michael Acquilano	
Ms. Lydia Doyle	Executive Director

Your Organization's Executive Officer	
Name	Title

From: [Anna Kelley](#)
To: [_STO - Appropriated Contributions](#)
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, January 6, 2025 11:34:29 AM
Attachments: [image005.png](#)
[image007.png](#)
[Outlook-DoC LOGO.png](#)

Good morning Meg,

Supporting Next Level Services and Getting Ahead Programs covers it perfectly! Thank you very much.

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestondiocese.org
akelley@charlestondiocese.org | o: 843.261.0462 | c: 803.457.0888

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From: _STO - Appropriated Contributions <_STO.Appropriated.Contributions@sto.sc.gov>
Sent: Monday, January 6, 2025 11:15 AM
To: Anna Kelley <akelley@charlestondiocese.org>
Cc: _STO - Appropriated Contributions <_STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Hey Anna,

What I'm looking for is like a one sentence brief purpose. It could just be "Supporting Next Level Services and Getting Ahead Programs" if you wanted it to be.

-Meg



Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201

803-734-2658 | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestondiocese.org>
Sent: Friday, January 3, 2025 10:48 AM
To: _STO - Appropriated Contributions <_STO.Appropriated.Contributions@sto.sc.gov>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good morning,

I hope you are doing well! I have this for how we intend to use the funds. Is this the correct information?

Over the years, our offices realized that we were repeatedly serving the same clients for food, clothing, and showers. Knowing that some of these individuals wanted to move out of these cycles, but lacked the skills and support to do so, we began working with clients to help them break the cycles of poverty. We partner with many other nonprofit organizations and government agencies to create a network around the clients to help them on this difficult journey. This collaborative approach helps clients know that they are not alone and that help is available to them if and when they need it. Giving people the tools and confidence they need to be self-sufficient benefits the entire community. These individuals have served as examples to their families and neighbors of how you can turn your life around. We've had the friends and relatives of past participants come through the programs after they see how their friend or loved one has thrived. Having fewer people in poverty and in

need of ongoing assistance strengthens individuals and communities while easing the burden on resources that are often stretched too thin.

If this is not what you are looking for, please let me know. Thank you so much!

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



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akelley@charlestdiocese.org | o: 843.261.0462 | c: 803.457.0888

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From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Friday, December 20, 2024 4:23 PM
To: Anna Kelley <akelley@charlestdiocese.org>
Cc: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Hey Anna,

Could you send me the wording for the purpose section? I will add it to the document for you and send you a copy.

Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

-Meg



Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II
South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
[803-734-2658](tel:803-734-2658) | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestdiocese.org>
Sent: Thursday, December 5, 2024 3:17 PM
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Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Lydia Doyle <LDoyle@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

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In Christ,

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Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestdiocese.org

akelley@charlestdiocese.org | 843.261.0462 ext. 1014

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Thank you,
Meg



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South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov

From: [_STO - Appropriated Contributions](#)
To: [Anna Kelley](#)
Cc: [_STO - Appropriated Contributions](#)
Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, January 6, 2025 11:15:40 AM
Attachments: [image005.png](#)
[image007.png](#)

Hey Anna,

What I'm looking for is like a one sentence brief purpose. It could just be "Supporting Next Level Services and Getting Ahead Programs" if you wanted it to be.

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestdiocese.org>
Sent: Friday, January 3, 2025 10:48 AM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

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Sent: Friday, December 20, 2024 4:23 PM
To: Anna Kelley <akelley@charlestdiocese.org>
Cc: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>

Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet

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South Carolina Treasurer's Office

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803-734-2658/STO.Appropriated.Contributions@sto.sc.gov

From: [Anna Kelley](#)
To: [_STO - Appropriated Contributions](#)
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Friday, January 3, 2025 10:48:03 AM
Attachments: [image005.png](#)
[image001.png](#)
[Outlook-DoC LOGO.png](#)

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South Carolina Treasurer’s Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | Meg.Romaniello@sto.sc.gov

From: Anna Kelley <akelley@charlestdiocese.org>
Sent: Thursday, December 5, 2024 3:17 PM
To: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Cc: Michael Acquilano <macquilano@charlestdiocese.org>; Lydia Doyle <LDoyle@charlestdiocese.org>; Dwight Cauthen <dc@screscent.com>
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet

Good afternoon,

Here is the request for contribution distribution form for Catholic Charities and their Getting Ahead and Next Level Services programs. Please let me know if there is anything additional that you need from us. Thank you so much for your help.

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestdiocese.org
akelley@charlestdiocese.org | 843.261.0462 ext. 1014

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Cc: Michael Acquilano <macquilano@charlestondiocese.org>; _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: FY25 Appropriated Contributions Enrollment Packet

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Cc: [Michael Aquilano](#); [Lydia Doyle](#); [Dwight Cauthen](#)
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Thursday, December 5, 2024 3:19:51 PM
Attachments: [image001.png](#)
[Outlook-DoC LOGO.png](#)
[Outlook-DoC LOGO.png](#)
[CCSC FY25 Earmarked Appropriations Disbursement Request form \(1\).pdf](#)

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Cc: Michael Acquilano <macquilano@charlestandioocese.org>; Dwight Cauthen <dc@screscent.com>; Lydia Doyle <LDoyle@charlestandioocese.org>
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803-734-2658|STO.Appropriated.Contributions@sto.sc.gov



State of South Carolina Request for Contribution Distribution

This form is designed to collect the information required by South Carolina in accordance with Proviso 117.21 of the appropriations act and Executive Order 2022-19. This form must be submitted to the state agency that is providing the contribution for the designated organization. The state agency providing the contribution should use this form to collect information from the designated organization. The information must be collected from the designated organization before the funds can be disbursed.

Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

Organization Information	
Entity Name	Catholic Charities of South Carolina
Address	901 Orange Grove Road
City/State/Zip	Charleston, SC 29407
Website	charitiessc.org
Tax ID #	51-0314369
Entity Type	Nonprofit Organization
Vendor #	7000247055

[Link to Search Vendor Number](#)

Organization Contact Information	
Contact Name	Lydia Doyle
Position/Title	Executive Director
Telephone	706-338-2961
Email	ldoyle@charlestandiocese.org
Secondary Organization Contact Information	
Name	Laura Trowbridge
Position/Title	Executive Assistant
Telephone	843-278-2976
Email	ltrowbridge@charlestandiocese.org

Plan/Accounting of how these funds will be spent:		
Description	Budget	Explanation
Salaries	\$60,000.00	Two staff members who facilitate Getting Ahead and Next Level Services
Direct Assistance to Individuals	\$31,600.00	Stipends for participants' necessary supplies for the length of program
Supplies	\$4,000.00	Covers program materials such as books, t-shirts, etc. for participants
Meeting expenses - graduation, food, etc.	\$4,000.00	Program graduation costs and meals for program meetings
Guide training	\$400.00	Training for Getting Ahead staff prior to working with clients
Grand Total	\$100,000.00	

Please explain how these funds will be used to provide a public benefit:

Over the years, our offices realized that we were repeatedly serving the same clients for food, clothing, and showers. Knowing that some of these individuals wanted to move out of these cycles, but lacked the skills and support to do so, we began working with clients to help them break the cycles of poverty. We partner with many other nonprofit organizations and government agencies to create a network around the clients to help them on this difficult journey. This collaborative approach, helps clients know that they are not alone and that help is available to them if and when they need it. Giving people the tools and confidence they need to be self-sufficient benefits the entire community. These individuals have served as examples to their families and neighbors of how you can turn your life around. We've had the friends and relatives of past participants come through the programs after they see how their friend or loved one has thrived. Having fewer people in poverty and in need of ongoing assistance strengthens individuals and communities while easing the burden on resources that are often stretched too thin.

Organization Certifications

- 1) Organization hereby gives assurance that no person shall, upon the grounds of race, creed, color, or national origin, be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under any program or activity for which this organization is responsible.
- 2) Organization certifies that it will provide quarterly spending reports to the Agency Providing Contribution listed above.
- 3) Organization certifies that it will provide an accounting at the end of the fiscal year to the Agency Providing Contribution listed above.
- 4) Organization certifies that it will allow the State Auditor to audit or cause to be audited the contributed funds.

Lydia Doyle

Organization Signature

Executive Director

Title

Lydia Doyle

Printed Name

5-Dec-24

Date

Certifications of State Agency Providing Contribution

- 1) State Agency certifies that the planned expenditure aligns with the Agency's mission and/or the purpose specified in the appropriations act.
- 2) State Agency certifies that the Organization has set forth a public purpose to be served through receipt of the expenditure.
- 3) State Agency certifies that it will make distributions directly to the organization.
- 4) State Agency certifies that it will provide the quarterly spending reports and accounting received from the organization to the Senate Finance Committee, House Ways and Means Committee, and the Executive Budget Office by June 30, 2025.
- 5) State Agency certifies that it will publish on their website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 of the appropriations act.
- 6) State Agency will certify to the Office of the Governor that it has complied with the requirements of Executive Order 2022-19 by June 30, 2025.

*

Agency Head Signature

Date

Printed Name

***The undersigned is signing on behalf of the Office of the State Treasurer (STO) and the State Treasurer. Note that STO is not an agency as defined by Executive Order 2022-19 and therefore, is not subject to the requirements therein.**

This packet has been reviewed and is ready for approval and payment.

Reviewed by: _____

Reviewed by: _____

Governing Board and Executive Officer - Nonprofit Organizations Only

For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

Members of Your Organization's Governing Board	
Name	Board Position, if applicable
Most Rev. Jacques Fabre-Jeune, CS	Bishop of Charleston; President of the Board
Very Rev. Gregory Wilson	Vicar General; Chairman of the Board
Very Rev. D. Anthony Droze	Vicar General; Vice-Chair of the Board
Mr. Mike Munafo	Treasurer
Ms. Mavis Huger	
Mr. Jose Estevez	
Ms. Lindsey Vann	
Mr. Michael Acquilano	
Ms. Lydia Doyle	Executive Director

Your Organization's Executive Officer	
Name	Title

From: [Anna Kelley](#)
To: [_STO - Appropriated Contributions](#)
Cc: [Michael Acquilano](#); [Dwight Cauthen](#); [Lydia Doyle](#)
Subject: Re: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, October 28, 2024 3:29:30 PM
Attachments: [image001.png](#)
[Outlook-DoC LOGO.png](#)

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Subject: RE: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, October 28, 2024 2:41:37 PM
Attachments: [image001.png](#)

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South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov

From: [Anna Kelley](#)
To: [_STO - Appropriated Contributions](#)
Cc: [Michael Acquilano](#); [Dwight Cauthen](#); [Lydia Doyle](#)
Subject: [External] Re: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, October 28, 2024 2:03:50 PM
Attachments: [Outlook-DoC LOGO.png](#)
[STO Appropriated Funds Cover Letter - Catholic Charities - Next Level Services and Getting Ahead Programs.pdf](#)
[FY25 Earmarked Appropriations Disbursement Request form update.xlsx](#)

Good afternoon,

I appreciate you all resending these instructions. I missed your original email and I apologize for the delay. Would you please clarify when the deadline is to submit the allocation request? The Director of Catholic Charities of South Carolina is out of the office until next week so she will not be able to complete them until then. Would it be possible to submit them then? Thank you again for your patience with us!

In Christ,

Anna Kelley, Legislative Affairs Specialist
Office of Communications



901 Orange Grove Rd, Charleston, SC 29407 | charlestandiocese.org
akelley@charlestandiocese.org | 843.261.0462 ext. 1014

OUR MISSION: *The Chancery exists to serve the mission of the Bishop of Charleston to teach, sanctify, and govern the Catholic Church in South Carolina. Led by the Bishop, the Chancery supports the clergy, religious, and lay faithful in fulfilling the Great Commission given to us by the Lord Jesus (Mt 28:16-20).*

Confidentiality Notice: This e-mail message from the Diocese of Charleston, including any attachments, is for the sole use of the intended recipient (s) and may contain confidential or proprietary information. Any unauthorized review, use, disclosure or distribution is prohibited.

From: _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Sent: Monday, October 28, 2024 1:03 PM
To: Anna Kelley <akelley@charlestandiocese.org>
Cc: Michael Acquilano <macquilano@charlestandiocese.org>; _STO - Appropriated Contributions <STO.Appropriated.Contributions@sto.sc.gov>
Subject: FY25 Appropriated Contributions Enrollment Packet

Hello,

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. Your organization was selected as one of those outside organizations. I have attached 2 files as part of your enrollment packet. Please read the Appropriated Funds Cover Letter first. There you will find important information regarding FY 2024-2025 reporting requirements and guidance on how to complete the Earmarked Appropriations Disbursement Request form. In order for funds to be disbursed to your organization, you will not only need to submit the Earmarked Appropriations Disbursement Request form but also be registered with the Secretary of State's ("SOS") Office and as a vendor with the State of South Carolina. Details on how to register with the SOS and as a vendor will be included in the attached letter. The registration with the SOS is required per Proviso 118.20.D, but it does not apply to governmental entities or entities created by statute. All completed forms should be submitted to the STO - Appropriated Contributions email address listed below.

STO.Appropriated.Contributions@sto.sc.gov

In accordance with Executive Order 2022-19, STO is required to promptly make available for public review and inspection on our website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21. Below is the link to where the information will be available on our website.

<https://treasurer.sc.gov/about-us/transparency/earmark-transparency/>

If you have any questions, please do not hesitate to contact us.

Thank you,
Meg



Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov

September 10, 2024

Michael Acquilano
Catholic Charities of South Carolina
901 Orange Grove Road
Charleston, South Carolina 29407

RE: State Appropriated Contributions, FY 24-25 Reporting Requirements

Dear Michael Acquilano:

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. The amount below indicates the funds which have been allotted in our agency's budget for your organization.

<u>Organization receiving appropriated funds:</u>	<u>Amount</u>
Catholic Charities - Next Level Services and Getting Ahead Programs	\$100,000.00

Budget Proviso 117.21 outlines reporting requirements for recipients of appropriated contributions. In addition, please note that Section 11-9-110 of the South Carolina Code requires that you agree to be audited by the State Auditor. (A copy of these applicable laws is attached for your convenience.)

Please see enclosed Excel workbook for data we must collect to be able to disburse these funds. This initial report, along with other information as detailed within the instructions, must be submitted in electronic format to STO prior to funds being dispersed. After the funds have been dispersed, you must complete quarterly spending reports until funds are fully expended. The quarterly report template will be provided at a future date. Your submissions will be forwarded to the Chairman of the Senate Finance Committee, the Chairman of the House Ways and Means Committee, and the Executive Budget Office by the STO. Per Governor McMaster's Executive Order 2022-19, any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 will be made available for public review and inspection on the STO website.

Please note that to be paid by the State of South Carolina, you must be a registered vendor of the State. If you are not already a registered vendor, please see <https://procurement.sc.gov/doing-biz/registration> to complete this required task. Once registered, please ensure you include your State of SC vendor number on the enclosed Earmarked Appropriations Disbursement Request form when you return it to the STO.

In accordance with Proviso 118.20.D, funds shall not be disbursed until verification that receiver's organization is registered as a business, nonprofit, or charitable organization with the South Carolina Secretary of State's office (SOS). This requirement does not apply to governmental entities or entities created by statute. If your organization has not registered or obtained an exemption from the SC SOS's office, please follow the link below to complete registration or to request a registration exemption.

[Before You File Online | SC Secretary of State](#)

Should you have any questions or concerns, please do not hesitate to email the Division of Treasury Management at STO.Appropriated.Contributions@sto.sc.gov. We look forward to working with you.

Sincerely,

Meg Romaniello | Accounting/Fiscal Manager II
South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Office Building
Columbia, SC 29201

**SOUTH CAROLINA OFFICE OF THE STATE TREASURE
APPROPRIATED CONTRIBUTIONS REPORTING REQUIREMENTS**

INSTRUCTIONS

The South Carolina General Assembly tasked the South Carolina Office of State Treasurer (STO) with distributing appropriated contributions to your organization. State Budget Proviso 117.21 mandates that each organization receiving a contribution render to the state agency making the contribution specific information.

The information collection process will take place in multiple parts, Earmarked Appropriations Disbursement Request form and Quarterly Expenditure Reports. All responses submitted by your organization should be provided to the STO via STO.Appropriated.Contributions@sto.sc.gov. If your organization was appropriated contributions for more than one purpose, please complete **separate** forms and reports for **each project**.

The Earmarked Appropriations Disbursement Request form is due to STO prior to funds being dispersed.

The Quarterly Expenditure Reports are due to STO every quarter after receiving the funds. Should the initiative continue beyond June 30, 2025, the organization must continue to provide a quarterly report until completion.

Quarterly Update Schedule				
Time Frame	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30
Due Date	10/15	1/15	4/15	7/15

All responses should reflect the actual expenditures made by the organization as compared to the appropriated funds provided by STO.

Applicable Law on Reporting Responsibilities

(For additional information, see the document entitled, Law Related to Appropriated Contributions)

Proviso 117.21 requires the following:

- The funds appropriated in this act for contributions ***shall not be disbursed*** until a plan of how the state funds will be spent and how the expenditures will provide a public benefit are filed with the appropriate state agency.
- No funds in this act shall be disbursed to organizations or purposes which practice discrimination against persons by virtue of race, creed, color or national origin.
- After receiving the funds, organizations shall provide quarterly spending updates to the respective state agency.
- After all state funds have been expended, each organization shall provide an accounting of how the funds were spent, ***including an accounting of funds provided to subgrantees and affiliated non-profits***.
- State agencies receiving such data from organizations shall forward the information to the Executive Budget Office, the Chairman of the Senate Finance Committee, and the Chairman of the House Ways and Means Committee.

SOUTH CAROLINA OFFICE OF THE STATE TREASURER REQUEST FOR CONTRIBUTION DISTRIBUTION

INSTRUCTIONS

Below are details about the various sections of the disbursement request form and some answers to frequently asked questions.

- Contribution Information
 - Amount
 - This amount should match the amount awarded in Proviso 118.20.B.99.
 - Purpose
 - This should be a very brief explanation (no more than one sentence) of the purpose the funds will be used for.
- Organization Information
 - Website
 - If you do not have a website, please leave blank.
 - Entity Type
 - Please select one of the options from the drop down rather than typing in this cell.
 - Vendor Number
 - If you do not know your vendor number, please use the following link to search for it:
<https://webprod.cio.sc.gov/SCVendorSearch/vendorSearch.do>
 - If you do not have a vendor number, please use the following link:
<https://procurement.sc.gov/doing-biz/registration>
 - For vendor registration questions and assistance contact the Division of Procurement Services at 803-737-0600.
- Organization Contact Information and Secondary Organization Contact Information
 - Two contacts are required.
 - An email address for both contacts is also required.
- Plan/Accounting of how these funds will be spent.
 - Description
 - Expenditure descriptions similar to those used in your organization's accounting records should be used.
 - Budget
 - It is normal for these to be estimates since many organizations are not certain the exact amounts needed for each line item at the start of their projects.
 - The total should match the amount listed in the contribution information.
 - Even if the total to complete the project is more than what has been awarded, please only list what the awarded funds will be used toward.
 - Explanation
 - When applicable, can be used to provide additional information to categorize expenditures by program or initiative.
- Please explain how these funds will be used to provide a public benefit.
 - Explanations typically do not go over the space provided, but if needed, please email STO.Appropriated.Contributions@sto.sc.gov.
- Organization Certifications
 - The signer for the organization can be whomever the organization chooses to sign. The proviso does not state who the organization's signer has to be.
- Certifications of State Agency Providing Contribution
 - Please leave blank. This section is to be completed by STO.
- Governing Board and Executive Tab
 - Only needs to be completed by Non-profit Organizations.
 - If additional lines are needed, please email STO.Appropriated.Contributions@sto.sc.gov.

Law Related to Appropriated Contributions

Proviso 117.21. GP: Organizations Receiving State Appropriations Report

Each state agency receiving funds that are a direct appropriation to a non-profit organization, prior to disbursing the funds, shall require from each recipient organization:

1. a plan of how the state funds will be spent and
2. how the expenditures will provide a public benefit.

The Executive Budget Office, Department of Administration shall provide each state agency with a standard form for collecting the information required.

After receiving the funds, non-profit organizations shall provide **quarterly** spending updates to the respective state agency.

After all state funds have been expended, each organization shall provide an accounting of how the funds were spent, including an accounting of funds provided to subgrantees and affiliated non-profits.

State agencies receiving funds pursuant to this provision shall report the information collected to the Executive Budget Office, the Chairman of the Senate Finance Committee, and the Chairman of the House Ways and Means Committee by **June 30th**.

No funds in this act shall be disbursed to organizations or purposes which practice discrimination against persons by virtue of race, creed, color or national origin.

Executive Order No. 2022-19 Section 1. C.

I hereby order and direct, pursuant to article IV, section 17 of the South Carolina Constitution and sections 1-1-840 and 1-3-10 of the South Carolina Code of Laws, that any Executive Branch agency or department, as further defined herein, that receives earmarked appropriations, as further defined herein, in the annual Appropriations Act shall promptly make available for public review and inspection on the agency or department's website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21.

SECTION 11-9-110. Organization to which contribution is appropriated to submit statement to Executive Budget Office and the Revenue and Fiscal Affairs Office as to nature and function of organization and use of contribution.

Each organization to which a contribution is made in the contributions section of the general appropriation bill shall submit to the Executive Budget Office and the Revenue and Fiscal Affairs Office by the end of the applicable fiscal year a detailed statement explaining the nature and function of the organization as well as a detailed statement explaining the use that was made of the contribution. The statements must be available at the office of the Executive Budget Office and the Revenue and Fiscal Affairs Office for public inspection and given to a member of the General Assembly upon request.

A contribution must not be made to an organization until it agrees in writing to allow the State Auditor to audit or cause to be audited the contributed funds.



Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

Organization Contact Information	
Contact Name	
Position/Title	
Telephone	
Email	
Secondary Organization Contact Information	
Name	
Position/Title	
Telephone	
Email	

Plan/Accounting of how these funds will be spent:		
Description	Budget	Explanation
Grand Total	\$0.00	

[illegible]

- 1) Organization hereby gives assurance that no person shall, upon the grounds of race, creed, color, or national origin, be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under any program or activity for which this organization is responsible.
- 2) Organization certifies that it will provide quarterly spending reports to the Agency Providing Contribution listed above.
- 3) Organization certifies that it will provide an accounting at the end of the fiscal year to the Agency Providing Contribution listed above.
- 4) Organization certifies that it will allow the State Auditor to audit or cause to be audited the contributed funds.

Date _____

- 1) State Agency certifies that the planned expenditure aligns with the Agency's mission and/or the purpose specified in the appropriations act.
- 2) State Agency certifies that the Organization has set forth a public purpose to be served through receipt of the expenditure.
- 3) State Agency certifies that it will make distributions directly to the organization.
- 4) State Agency certifies that it will provide the quarterly spending reports and accounting received from the organization to the Senate Finance Committee, House Ways and Means Committee, and the Executive Budget Office by June 30, 2025.
- 5) State Agency certifies that it will publish on their website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 of the appropriations act.
- 6) State Agency will certify to the Office of the Governor that it has complied with the requirements of Executive Order 2022-19 by June 30, 2025.

Printed Name _____

This packet has been reviewed and is ready for approval and payment.

Reviewed by:

From: [giSTT Message](#)
To: [Romaniello, Meg](#)
Subject: [External] Voice Message from ANNA KELLEY (843-261-0462) on 10/28/24 1:33 PM for 8037342658
Date: Monday, October 28, 2024 1:34:24 PM
Attachments: [8432610462-102824-133302-8037342658-1145200-1.wav](#)



Voice Message from ANNA KELLEY (843-261-0462) on 10/28/24 1:33 PM (30 second msg)

MESSAGE:

"Hi there, Meg. This is Anna Kelly. I'm calling from the Diocese of Charleston. I'm calling about the appropriation in the 2024-2025 budget for South Carolina Catholic Charities. I just wanted to touch base and see when the deadline for that to fill out the paperwork and things are. So if you wouldn't mind giving me a call back. My number is 843-261-0462. Thank you so much. Bye."

There are 0 new and 0 old messages in your mailbox.

From: [_STO - Appropriated Contributions](#)
To: ["akelley@charlestandiocese.org"](mailto:akelley@charlestandiocese.org)
Cc: macquilano@charlestandiocese.org; [_STO - Appropriated Contributions](#)
Subject: FY25 Appropriated Contributions Enrollment Packet
Date: Monday, October 28, 2024 1:03:22 PM
Attachments: [STO Appropriated Funds Cover Letter - Catholic Charities - Next Level Services and Getting Ahead Programs.pdf](#)
[FY25 Earmarked Appropriations Disbursement Request form update.xlsx](#)

Hello,

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. Your organization was selected as one of those outside organizations. I have attached 2 files as part of your enrollment packet. Please read the Appropriated Funds Cover Letter first. There you will find important information regarding FY 2024-2025 reporting requirements and guidance on how to complete the Earmarked Appropriations Disbursement Request form. In order for funds to be disbursed to your organization, you will not only need to submit the Earmarked Appropriations Disbursement Request form but also be registered with the Secretary of State's ("SOS") Office and as a vendor with the State of South Carolina. Details on how to register with the SOS and as a vendor will be included in the attached letter. The registration with the SOS is required per Proviso 118.20.D, but it does not apply to governmental entities or entities created by statute. All completed forms should be submitted to the STO - Appropriated Contributions email address listed below.

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If you have any questions, please do not hesitate to contact us.

Thank you,
Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | STO.Appropriated.Contributions@sto.sc.gov

September 10, 2024

Michael Acquilano
Catholic Charities of South Carolina
901 Orange Grove Road
Charleston, South Carolina 29407

RE: State Appropriated Contributions, FY 24-25 Reporting Requirements

Dear Michael Acquilano:

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. The amount below indicates the funds which have been allotted in our agency's budget for your organization.

<u>Organization receiving appropriated funds:</u>	<u>Amount</u>
Catholic Charities - Next Level Services and Getting Ahead Programs	\$100,000.00

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[Before You File Online | SC Secretary of State](#)

Should you have any questions or concerns, please do not hesitate to email the Division of Treasury Management at STO.Appropriated.Contributions@sto.sc.gov. We look forward to working with you.

Sincerely,

Meg Romaniello | Accounting/Fiscal Manager II
South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Office Building
Columbia, SC 29201

**SOUTH CAROLINA OFFICE OF THE STATE TREASURE
APPROPRIATED CONTRIBUTIONS REPORTING REQUIREMENTS**

INSTRUCTIONS

The South Carolina General Assembly tasked the South Carolina Office of State Treasurer (STO) with distributing appropriated contributions to your organization. State Budget Proviso 117.21 mandates that each organization receiving a contribution render to the state agency making the contribution specific information.

The information collection process will take place in multiple parts, Earmarked Appropriations Disbursement Request form and Quarterly Expenditure Reports. All responses submitted by your organization should be provided to the STO via STO.Appropriated.Contributions@sto.sc.gov. If your organization was appropriated contributions for more than one purpose, please complete **separate** forms and reports for **each project**.

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All responses should reflect the actual expenditures made by the organization as compared to the appropriated funds provided by STO.

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SOUTH CAROLINA OFFICE OF THE STATE TREASURER REQUEST FOR CONTRIBUTION DISTRIBUTION

INSTRUCTIONS

Below are details about the various sections of the disbursement request form and some answers to frequently asked questions.

- Contribution Information
 - Amount
 - This amount should match the amount awarded in Proviso 118.20.B.99.
 - Purpose
 - This should be a very brief explanation (no more than one sentence) of the purpose the funds will be used for.
- Organization Information
 - Website
 - If you do not have a website, please leave blank.
 - Entity Type
 - Please select one of the options from the drop down rather than typing in this cell.
 - Vendor Number
 - If you do not know your vendor number, please use the following link to search for it:
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 - For vendor registration questions and assistance contact the Division of Procurement Services at 803-737-0600.
- Organization Contact Information and Secondary Organization Contact Information
 - Two contacts are required.
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- Plan/Accounting of how these funds will be spent.
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 - Expenditure descriptions similar to those used in your organization's accounting records should be used.
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 - Explanation
 - When applicable, can be used to provide additional information to categorize expenditures by program or initiative.
- Please explain how these funds will be used to provide a public benefit.
 - Explanations typically do not go over the space provided, but if needed, please email STO.Appropriated.Contributions@sto.sc.gov.
- Organization Certifications
 - The signer for the organization can be whomever the organization chooses to sign. The proviso does not state who the organization's signer has to be.
- Certifications of State Agency Providing Contribution
 - Please leave blank. This section is to be completed by STO.
- Governing Board and Executive Tab
 - Only needs to be completed by Non-profit Organizations.
 - If additional lines are needed, please email STO.Appropriated.Contributions@sto.sc.gov.

Law Related to Appropriated Contributions

Proviso 117.21. GP: Organizations Receiving State Appropriations Report

Each state agency receiving funds that are a direct appropriation to a non-profit organization, prior to disbursing the funds, shall require from each recipient organization:

1. a plan of how the state funds will be spent and
2. how the expenditures will provide a public benefit.

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After receiving the funds, non-profit organizations shall provide quarterly spending updates to the respective state agency.

After all state funds have been expended, each organization shall provide an accounting of how the funds were spent, including an accounting of funds provided to subgrantees and affiliated non-profits.

State agencies receiving funds pursuant to this provision shall report the information collected to the Executive Budget Office, the Chairman of the Senate Finance Committee, and the Chairman of the House Ways and Means Committee by **June 30th**.

No funds in this act shall be disbursed to organizations or purposes which practice discrimination against persons by virtue of race, creed, color or national origin.

Executive Order No. 2022-19 Section 1. C.

I hereby order and direct, pursuant to article IV, section 17 of the South Carolina Constitution and sections 1-1-840 and 1-3-10 of the South Carolina Code of Laws, that any Executive Branch agency or department, as further defined herein, that receives earmarked appropriations, as further defined herein, in the annual Appropriations Act shall promptly make available for public review and inspection on the agency or department's website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21.

SECTION 11-9-110. Organization to which contribution is appropriated to submit statement to Executive Budget Office and the Revenue and Fiscal Affairs Office as to nature and function of organization and use of contribution.

Each organization to which a contribution is made in the contributions section of the general appropriation bill shall submit to the Executive Budget Office and the Revenue and Fiscal Affairs Office by the end of the applicable fiscal year a detailed statement explaining the nature and function of the organization as well as a detailed statement explaining the use that was made of the contribution. The statements must be available at the office of the Executive Budget Office and the Revenue and Fiscal Affairs Office for public inspection and given to a member of the General Assembly upon request.

A contribution must not be made to an organization until it agrees in writing to allow the State Auditor to audit or cause to be audited the contributed funds.



Contribution Information		
Amount	State Agency Providing the Contribution	Purpose
	X220 - Aid to Subdivisions - Treasurer	

Organization Contact Information	
Contact Name	
Position/Title	
Telephone	
Email	
Secondary Organization Contact Information	
Name	
Position/Title	
Telephone	
Email	

Plan/Accounting of how these funds will be spent:		
Description	Budget	Explanation
Grand Total	\$0.00	

--	--

- 1) Organization hereby gives assurance that no person shall, upon the grounds of race, creed, color, or national origin, be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under any program or activity for which this organization is responsible.
- 2) Organization certifies that it will provide quarterly spending reports to the Agency Providing Contribution listed above.
- 3) Organization certifies that it will provide an accounting at the end of the fiscal year to the Agency Providing Contribution listed above.
- 4) Organization certifies that it will allow the State Auditor to audit or cause to be audited the contributed funds.

Date _____

- 1) State Agency certifies that the planned expenditure aligns with the Agency's mission and/or the purpose specified in the appropriations act.
- 2) State Agency certifies that the Organization has set forth a public purpose to be served through receipt of the expenditure.
- 3) State Agency certifies that it will make distributions directly to the organization.
- 4) State Agency certifies that it will provide the quarterly spending reports and accounting received from the organization to the Senate Finance Committee, House Ways and Means Committee, and the Executive Budget Office by June 30, 2025.
- 5) State Agency certifies that it will publish on their website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 of the appropriations act.
- 6) State Agency will certify to the Office of the Governor that it has complied with the requirements of Executive Order 2022-19 by June 30, 2025.

Printed Name _____

This packet has been reviewed and is ready for approval and payment.

Reviewed by:

Governing Board and Executive Officer - Nonprofit Organizations Only
For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

<p>Governing Board and Executive Officer - Nonprofit Organizations Only</p> <p>For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.</p>
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[illegible]

Your Organization's Executive Officer	
Name	Title

From: [_STO - Appropriated Contributions](#)
To: macquilano@charlestandiocese.org
Cc: [_STO - Appropriated Contributions](#)
Subject: Status check for FY25 Earmarked Appropriations Disbursement Request form
Date: Wednesday, October 23, 2024 11:24:55 AM

Hello,

Currently, we have not received your completed Earmarked Appropriations Disbursement Request form.

I wanted to reach out to confirm that you received the FY25 Appropriated Contributions Enrollment Packet email sent on 9/11/24 and to check if you had any questions regarding the process, form, etc. If you need the email resent, please let me know and I will be happy to resend it to you.

If you believe you are not the best contact for this, please let me know who I should contact for your organization.

Please do not hesitate to reach out to me if you have any questions or need any assistance.

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office

1200 Senate Street, Suite 214

Wade Hampton Bldg., Columbia, SC 29201

[803-734-2658](tel:803-734-2658) | Meg.Romaniello@sto.sc.gov

From: [_STO - Appropriated Contributions](#)
To: macquilano@charlestandiocese.org
Cc: [_STO - Appropriated Contributions](#)
Subject: FY25 Appropriated Contributions Enrollment Packet
Date: Wednesday, September 11, 2024 11:52:43 AM
Attachments: [STO Appropriated Funds Cover Letter - Catholic Charities - Next Level Services and Getting Ahead Programs.pdf](#)
[FY25 Earmarked Appropriations Disbursement Request form update.xlsx](#)

Hello,

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. Your organization was selected as one of those outside organizations. I have attached 2 files as part of your enrollment packet. Please read the Appropriated Funds Cover Letter first. There you will find important information regarding FY 2024-2025 reporting requirements and guidance on how to complete the Earmarked Appropriations Disbursement Request form. In order for funds to be disbursed to your organization, you will not only need to submit the Earmarked Appropriations Disbursement Request form but also be registered with the Secretary of State's ("SOS") Office and as a vendor with the State of South Carolina. Details on how to register with the SOS and as a vendor will be included in the attached letter. The registration with the SOS is required per Proviso 118.20.D, but it does not apply to governmental entities or entities created by statute. All completed forms should be submitted to the STO - Appropriated Contributions email address listed below.

STO.Appropriated.Contributions@sto.sc.gov

In accordance with Executive Order 2022-19, STO is required to promptly make available for public review and inspection on our website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21. Below is the link to where the information will be available on our website.

<https://treasurer.sc.gov/about-us/transparency/earmark-transparency/>

If you have any questions, please do not hesitate to contact us.

Thank you,

-Meg

Meg Romaniello, MBA, CPM | Accounting/Fiscal Manager II

South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Bldg., Columbia, SC 29201
803-734-2658 | Meg.Romaniello@sto.sc.gov

September 10, 2024

Michael Acquilano
Catholic Charities of South Carolina
901 Orange Grove Road
Charleston, South Carolina 29407

RE: State Appropriated Contributions, FY 24-25 Reporting Requirements

Dear Michael Acquilano:

The State of South Carolina Fiscal Year 2024-2025 Appropriations Act provides the revenue for State government to meet its budgetary expenses. This year's Act included allocations to the Office of the State Treasurer (STO) reserved as one-time appropriations for contributions to outside organizations. The amount below indicates the funds which have been allotted in our agency's budget for your organization.

<u>Organization receiving appropriated funds:</u>	<u>Amount</u>
Catholic Charities - Next Level Services and Getting Ahead Programs	\$100,000.00

Budget Proviso 117.21 outlines reporting requirements for recipients of appropriated contributions. In addition, please note that Section 11-9-110 of the South Carolina Code requires that you agree to be audited by the State Auditor. (A copy of these applicable laws is attached for your convenience.)

Please see enclosed Excel workbook for data we must collect to be able to disburse these funds. This initial report, along with other information as detailed within the instructions, must be submitted in electronic format to STO prior to funds being dispersed. After the funds have been dispersed, you must complete quarterly spending reports until funds are fully expended. The quarterly report template will be provided at a future date. Your submissions will be forwarded to the Chairman of the Senate Finance Committee, the Chairman of the House Ways and Means Committee, and the Executive Budget Office by the STO. Per Governor McMaster's Executive Order 2022-19, any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 will be made available for public review and inspection on the STO website.

Please note that to be paid by the State of South Carolina, you must be a registered vendor of the State. If you are not already a registered vendor, please see <https://procurement.sc.gov/doing-biz/registration> to complete this required task. Once registered, please ensure you include your State of SC vendor number on the enclosed Earmarked Appropriations Disbursement Request form when you return it to the STO.

In accordance with Proviso 118.20.D, funds shall not be disbursed until verification that receiver's organization is registered as a business, nonprofit, or charitable organization with the South Carolina Secretary of State's office (SOS). This requirement does not apply to governmental entities or entities created by statute. If your organization has not registered or obtained an exemption from the SC SOS's office, please follow the link below to complete registration or to request a registration exemption.

[Before You File Online | SC Secretary of State](#)

Should you have any questions or concerns, please do not hesitate to email the Division of Treasury Management at STO.Appropriated.Contributions@sto.sc.gov. We look forward to working with you.

Sincerely,

Meg Romaniello | Accounting/Fiscal Manager II
South Carolina Treasurer's Office
1200 Senate Street, Suite 214
Wade Hampton Office Building
Columbia, SC 29201

**SOUTH CAROLINA OFFICE OF THE STATE TREASURE
APPROPRIATED CONTRIBUTIONS REPORTING REQUIREMENTS**

INSTRUCTIONS

The South Carolina General Assembly tasked the South Carolina Office of State Treasurer (STO) with distributing appropriated contributions to your organization. State Budget Proviso 117.21 mandates that each organization receiving a contribution render to the state agency making the contribution specific information.

The information collection process will take place in multiple parts, Earmarked Appropriations Disbursement Request form and Quarterly Expenditure Reports. All responses submitted by your organization should be provided to the STO via STO.Appropriated.Contributions@sto.sc.gov. If your organization was appropriated contributions for more than one purpose, please complete **separate** forms and reports for **each project**.

The Earmarked Appropriations Disbursement Request form is due to STO prior to funds being dispersed.

The Quarterly Expenditure Reports are due to STO every quarter after receiving the funds. Should the initiative continue beyond June 30, 2025, the organization must continue to provide a quarterly report until completion.

Quarterly Update Schedule				
Time Frame	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30
Due Date	10/15	1/15	4/15	7/15

All responses should reflect the actual expenditures made by the organization as compared to the appropriated funds provided by STO.

Applicable Law on Reporting Responsibilities

(For additional information, see the document entitled, Law Related to Appropriated Contributions)

Proviso 117.21 requires the following:

- The funds appropriated in this act for contributions ***shall not be disbursed*** until a plan of how the state funds will be spent and how the expenditures will provide a public benefit are filed with the appropriate state agency.
- No funds in this act shall be disbursed to organizations or purposes which practice discrimination against persons by virtue of race, creed, color or national origin.
- After receiving the funds, organizations shall provide quarterly spending updates to the respective state agency.
- After all state funds have been expended, each organization shall provide an accounting of how the funds were spent, ***including an accounting of funds provided to subgrantees and affiliated non-profits***.
- State agencies receiving such data from organizations shall forward the information to the Executive Budget Office, the Chairman of the Senate Finance Committee, and the Chairman of the House Ways and Means Committee.

SOUTH CAROLINA OFFICE OF THE STATE TREASURER REQUEST FOR CONTRIBUTION DISTRIBUTION

INSTRUCTIONS

Below are details about the various sections of the disbursement request form and some answers to frequently asked questions.

- Contribution Information
 - Amount
 - This amount should match the amount awarded in Proviso 118.20.B.99.
 - Purpose
 - This should be a very brief explanation (no more than one sentence) of the purpose the funds will be used for.
- Organization Information
 - Website
 - If you do not have a website, please leave blank.
 - Entity Type
 - Please select one of the options from the drop down rather than typing in this cell.
 - Vendor Number
 - If you do not know your vendor number, please use the following link to search for it:
<https://webprod.cio.sc.gov/SCVendorSearch/vendorSearch.do>
 - If you do not have a vendor number, please use the following link:
<https://procurement.sc.gov/doing-biz/registration>
 - For vendor registration questions and assistance contact the Division of Procurement Services at 803-737-0600.
- Organization Contact Information and Secondary Organization Contact Information
 - Two contacts are required.
 - An email address for both contacts is also required.
- Plan/Accounting of how these funds will be spent.
 - Description
 - Expenditure descriptions similar to those used in your organization's accounting records should be used.
 - Budget
 - It is normal for these to be estimates since many organizations are not certain the exact amounts needed for each line item at the start of their projects.
 - The total should match the amount listed in the contribution information.
 - Even if the total to complete the project is more than what has been awarded, please only list what the awarded funds will be used toward.
 - Explanation
 - When applicable, can be used to provide additional information to categorize expenditures by program or initiative.
- Please explain how these funds will be used to provide a public benefit.
 - Explanations typically do not go over the space provided, but if needed, please email STO.Appropriated.Contributions@sto.sc.gov.
- Organization Certifications
 - The signer for the organization can be whomever the organization chooses to sign. The proviso does not state who the organization's signer has to be.
- Certifications of State Agency Providing Contribution
 - Please leave blank. This section is to be completed by STO.
- Governing Board and Executive Tab
 - Only needs to be completed by Non-profit Organizations.
 - If additional lines are needed, please email STO.Appropriated.Contributions@sto.sc.gov.

Law Related to Appropriated Contributions

Proviso 117.21. GP: Organizations Receiving State Appropriations Report

Each state agency receiving funds that are a direct appropriation to a non-profit organization, prior to disbursing the funds, shall require from each recipient organization:

1. a plan of how the state funds will be spent and
2. how the expenditures will provide a public benefit.

The Executive Budget Office, Department of Administration shall provide each state agency with a standard form for collecting the information required.

After receiving the funds, non-profit organizations shall provide quarterly spending updates to the respective state agency.

After all state funds have been expended, each organization shall provide an accounting of how the funds were spent, including an accounting of funds provided to subgrantees and affiliated non-profits.

State agencies receiving funds pursuant to this provision shall report the information collected to the Executive Budget Office, the Chairman of the Senate Finance Committee, and the Chairman of the House Ways and Means Committee by **June 30th**.

No funds in this act shall be disbursed to organizations or purposes which practice discrimination against persons by virtue of race, creed, color or national origin.

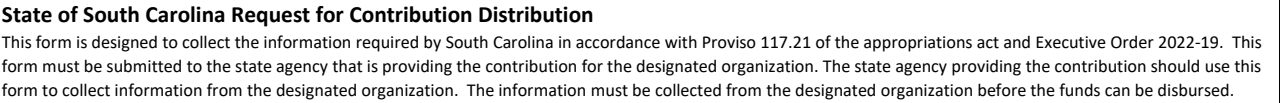
Executive Order No. 2022-19 Section 1. C.

I hereby order and direct, pursuant to article IV, section 17 of the South Carolina Constitution and sections 1-1-840 and 1-3-10 of the South Carolina Code of Laws, that any Executive Branch agency or department, as further defined herein, that receives earmarked appropriations, as further defined herein, in the annual Appropriations Act shall promptly make available for public review and inspection on the agency or department's website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21.

SECTION 11-9-110. Organization to which contribution is appropriated to submit statement to Executive Budget Office and the Revenue and Fiscal Affairs Office as to nature and function of organization and use of contribution.

Each organization to which a contribution is made in the contributions section of the general appropriation bill shall submit to the Executive Budget Office and the Revenue and Fiscal Affairs Office by the end of the applicable fiscal year a detailed statement explaining the nature and function of the organization as well as a detailed statement explaining the use that was made of the contribution. The statements must be available at the office of the Executive Budget Office and the Revenue and Fiscal Affairs Office for public inspection and given to a member of the General Assembly upon request.

A contribution must not be made to an organization until it agrees in writing to allow the State Auditor to audit or cause to be audited the contributed funds.



Organization Contact Information	
Contact Name	
Position/Title	
Telephone	
Email	
Secondary Organization Contact Information	
Name	
Position/Title	
Telephone	
Email	

Please explain how these funds will be used to provide a public benefit:	

- 1) Organization hereby gives assurance that no person shall, upon the grounds of race, creed, color, or national origin, be excluded from participation in, be denied the benefit of, or be otherwise subjected to discrimination under any program or activity for which this organization is responsible.
- 2) Organization certifies that it will provide quarterly spending reports to the Agency Providing Contribution listed above.
- 3) Organization certifies that it will provide an accounting at the end of the fiscal year to the Agency Providing Contribution listed above.
- 4) Organization certifies that it will allow the State Auditor to audit or cause to be audited the contributed funds.

Date _____

- 1) State Agency certifies that the planned expenditure aligns with the Agency's mission and/or the purpose specified in the appropriations act.
- 2) State Agency certifies that the Organization has set forth a public purpose to be served through receipt of the expenditure.
- 3) State Agency certifies that it will make distributions directly to the organization.
- 4) State Agency certifies that it will provide the quarterly spending reports and accounting received from the organization to the Senate Finance Committee, House Ways and Means Committee, and the Executive Budget Office by June 30, 2025.
- 5) State Agency certifies that it will publish on their website any and all reports, accountings, forms, updates, communications, or other materials required by Proviso 117.21 of the appropriations act.
- 6) State Agency will certify to the Office of the Governor that it has complied with the requirements of Executive Order 2022-19 by June 30, 2025.

Printed Name _____

This packet has been reviewed and is ready for approval and payment.

Reviewed by: _____

Reviewed by: _____

Governing Board and Executive Officer - Nonprofit Organizations Only
For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

For nonprofit organizations only, provide below the names of the individuals who serve on your organization's governing board and, if applicable, their board position. Please also provide the name and title of your organization's executive officer.

[illegible]

Your Organization's Executive Officer	
Name	Title