

**ANNUAL PROGRESS REPORT  
FREQUENTLY ASKED QUESTIONS**

**1. What is the deadline for submitting my Annual Progress Report (APR) for 2015-2016?**

The Annual Progress Report for 2015-2016 has two deadlines:

- Sections 1, 2 & 3 and Attachments 1, 2 & 8 are due **by 4 p.m. on Monday, August 1, 2016.**
- Attachments 3 thru 7 (financial documents) are due **by 4 p.m. on Thursday, September 15, 2016.**

**2. What happens if I don't submit my Annual Progress Report on time?**

**According to United Way's policies, grant funding to organizations that do not meet the deadline is suspended beginning the first of the month after the APR due date. Funding is reinstated (not retroactively) once a complete report is filed.**

**3. Do I have to submit printed copies of everything I submit via E-mail (including attachments)?**

Yes. **A set of printed copies is required for our files (as a backup).** This is very important in case there is a problem with the electronic files. Printed copies can be mailed or delivered in-person to the United Way office. The same deadlines apply.

**4. Our agency/organization receives funding from United Way for more than one program. Can our APR be submitted for all programs simultaneously?**

Yes. **The APR can be submitted for all of your funded programs simultaneously.** However, as indicated in the table below, a copy of some documents will need to be submitted for **EACH** program:

<b>Section 1: Agency Information</b>	<b>One copy per agency</b>
<b>Section 2: Program Information</b>	<b>One copy for EACH program</b>
<b>Section 3: Outcome Measurement Results</b>	<b>One copy for EACH program</b>
<b>Attachment 1: Organizational Chart for Agency/Organization</b>	<b>One copy per agency</b>
<b>Attachment 1: Organizational Chart for Program</b>	<b>One copy for EACH program</b>
<b>Attachment 2: Board of Directors for Agency</b>	<b>One copy per agency</b>
<b>Attachment 2: Program Advisory Board</b>	<b>One copy for EACH program</b>
<b>Attachment 3: Audit</b>	<b>One copy per agency</b>
<b>Attachment 4: IRS 990</b>	<b>One copy per agency</b>
<b>Attachment 5: Agency Balance Sheet</b>	<b>One copy per agency</b>
<b>Attachment 6: Agency Profit &amp; Loss Statement</b>	<b>One copy per agency</b>
<b>Attachment 7: Program Profit &amp; Loss Statement</b>	<b>One copy for EACH program</b>
<b>Attachment 8: Program Service Statistics</b>	<b>One copy for EACH program</b>

**5. How do we address issues of confidentiality when reporting a success story or supplying a quote?**

**To preserve confidentiality, you do not need to identify the client by name.** If it is easier to tell the story using a name, use a fictitious first name only. Also, if specific elements of the story make it easy to identify the client (even though that person's name is not used), please make appropriate edits to preserve confidentiality. Since United Way may ask an agency about sharing those success stories in its newsletter or using a quote in a handout, it is much easier to do when a person can not be identified.

**6. Will I have to submit an Annual Progress Report again next year?**

Yes. **The APR is required following each year of funding.**

**7. What if my agency’s fiscal year is not the same as United Way’s fiscal year?**

In order for consistency in reporting, United Way requires that the financial information submitted be aligned with the grant period (in this case, 7/1/15 – 6/30/16), regardless of your agency’s fiscal year. **If your fiscal year differs from that of United Way’s grant period, please make appropriate adjustments when reporting your data.**

For example, if your agency’s fiscal year is a calendar year, you would need to do the following to align your data with the grant period:

*Calculation: Year End 12/31/15 – Period Ending 6/30/15 + Period Ending 6/30/16 = Grant Period 7/1/15 thru 6/30/16  
Telephone Exp.: \$1,500 – \$700 + \$600 = \$1,400*

Sample Line Items	Period Ending 6/30/15	Year End 12/31/15	Period Ending 6/30/16	What you would report to United Way for the Grant Period 7/1/15 - 6/30/16
Telephone	\$ 700	\$ 1,500	\$ 600	\$ 1,400
Postage & Shipping	\$ 200	\$ 500	\$ 100	\$ 400
...				
Total Expenses	\$ 10,000	\$ 100,000	\$ 12,000	\$ 102,000

**8. Spreadsheets for Attachments 5, 6 & 7 are not in the same format that our agency/organization uses. Can we submit our documentation as it is and not fill out the United Way spreadsheets?**

No. **For standardization purposes, you will need to transfer the information provided by your agency/organization into Attachments 5, 6 & 7.** This is also important to the Finance Review Committee and the process used to evaluate what has been submitted by each agency/organization and its funded program(s).

**9. My agency is funded on a calendar year, so I do not know what my projected budget will be for the entire period from 7/1/14 - 6/30/15. How do I fill out that information in Attachments 6 & 7?**

**This is just a projection of the budget for an agency and its program(s) for next year, so it is only an estimate and nothing is binding because things do change.** To fill out the spreadsheets, agencies in this kind of situation often provide estimates based on their previous year’s budget. In some cases, agencies just copy the information from last year’s budget because they are not anticipating any significant changes.

**10. What exactly does United Way want for Attachment 7 as it pertains to our funded program?**

United Way is asking for financial information about the revenues and expenses specifically associated with your program(s) that receive(s) grant funding from United Way. To be clearer, it is the **financial information for the funded program(s)—not the entire agency.** This may be a little confusing (and even difficult for a program that is part of a large agency), but United Way is really looking for specifics about the costs associated with running your program(s) because that also helps determine how much a **program is dependent upon United Way funding.**

**11. For Attachment 8, should we supply service statistics for those served outside of Chippewa and Eau Claire Counties?**

No. **For purposes of this APR to United Way, service statistics should only be reported for the people from Chippewa and Eau Claire counties who receive those services. If you do not know if a person is from Chippewa or Eau Claire County, include them in the count under “Unknown.”**

**12. What if we do not track some of the service statistics that United Way wants us to report?**

If your program does not track the statistics that United Way has requested on the APR, please **estimate to the best of your ability**. Since this request for service statistics is asked every year for the APR, please strongly consider initiating this type of tracking so that you can report it in the future.

**13. What are the Federal Poverty Levels that are being referenced by United Way? How are they different for individuals and families?**

Federal Poverty Levels – Tables for Annual, Monthly & Hourly Wages  
Source: Wisconsin Council on Children & Families

**2015:** <http://www.wisconsinbudgetproject.org/2015-federal-poverty-levels>

**2016:** <http://www.wisconsinbudgetproject.org/2016-federal-poverty-levels>

**14. I seem to be having problems printing Attachment 8. What can I do?**

The spreadsheet with the service statistics is wide, so do not be surprised when it extends to several pages. It is fine if you want to “cut-and-tape” the pages together. There is room to list multiple funded programs, but that does not mean you have to print all of those pages. Just list what you need and go ahead and delete the others.

If you have more questions or need additional information, please contact the United Way staff member response for your area:

Education	Kari Stroede Director of the Successful Children’s Network	<a href="mailto:kstroede@uwgcv.org">kstroede@uwgcv.org</a>
Income	Jessica Oleson-Bue Director of the Financial Stability Partnership	<a href="mailto:jolesonbue@uwgcv.org">jolesonbue@uwgcv.org</a>
Health	Nicole Rubenzer Director of the Community Health Initiative	<a href="mailto:nrubenzer@uwgcv.org">nrubenzer@uwgcv.org</a>
Basic Needs	Michael Hoadley Director of Community Impact	<a href="mailto:mhoadley@uwgcv.org">mhoadley@uwgcv.org</a>

All directors can also be contacted by calling the United Way office at 715-834-5043.

*(This document will be expanded as more questions arise and is available at [www.uwgcv.org](http://www.uwgcv.org).)*