

**ANNUAL PROGRESS REPORT 2016-2017  
United Way of the Greater Chippewa Valley (UWGCV)  
FREQUENTLY ASKED QUESTIONS**

**1. What is the deadline for submitting my Annual Progress Report (APR) for 2016-2017?**

The Annual Progress Report for 2016-2017 has two deadlines:

- Sections 1, 2 & 3 and Attachments A, B, C & D are due **by noon on Tuesday, August 1, 2017.**
- Attachments E, F & G (financial documents) are due **by noon on Friday, September 1, 2017.**

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

According to UWGCV'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 UWGCV office. The same deadlines apply.

**4. Our agency/organization receives funding from UWGCV 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 A: Program Profit &amp; Loss Statement</b>	<b>One copy for EACH program</b>
<b>Attachment B: Organizational Chart for Agency &amp; Program</b>	<b>One copy for EACH program</b>
<b>Attachment C: Board of Directors for Agency</b>	<b>One copy per agency</b>
<b>Attachment C: Program Advisory Board</b>	<b>One copy for EACH program</b>
<b>Attachment D: Program Service Statistics</b>	<b>One copy for EACH program</b>
<b>Attachment E: Agency Profit &amp; Loss Statement</b>	<b>One copy per agency</b>
<b>Attachment F: Audit</b>	<b>One copy per agency</b>
<b>Attachment G: Federal Tax Form (IRS 990 or 1040)</b>	<b>One copy per agency</b>

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

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

**6. 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 UWGCV 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 cannot be identified.

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

In order for consistency in reporting, UWGCV requires that the financial information submitted be aligned with the grant period (in this case, 7/1/16 – 6/30/17), regardless of your agency’s fiscal year. **If your fiscal year differs from that of UWGCV’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: January-December 2016 – January-June 2016 + January-June 2017 = Grant Period July 2016-June 2017*  
*Telephone Exp.: \$1,500 – \$700 + \$600 = \$1,400*

Sample Line Items	January-December 2016	January-June 2016	January-June 2017	What you would report to UWGCV for the Grant Period July 2016 – June 2017
Telephone	\$ 1,500	\$ 700	\$ 600	\$ 1,400
Postage & Shipping	\$ 500	\$ 200	\$ 100	\$ 400
...				
Total Expenses	\$ 100,000	\$ 10,000	\$ 12,000	\$ 102,000

**8. The spreadsheet for Attachment A is not in the same format that our agency/organization uses. Can we submit our documentation as it is and not fill out the UWGCV spreadsheet?**

**For standardization purposes, you will need to transfer the information provided by your agency/organization into Attachment A for the funded program(s).** 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). Please see question 9 for more clarification regarding Attachment A. See question 11 regarding the Agency Profit & Loss Statement.

**9. What exactly does UWGCV want for Attachment A as it pertains to our funded program?**

UWGCV is asking for financial information about the revenues and expenses specifically associated with your program(s) that receive(s) grant funding from UWGCV. 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 UWGCV 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 UWGCV funding.

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

No. For purposes of this APR to UWGCV, 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.”

**11. What if we do not track some of the service statistics that UWGCV wants us to report?**

If your program does not track the statistics that UWGCV 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.

**12. I seem to be having problems printing Attachment D. 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.

**13. Is there a standard form that our program needs to use for Attachment E?**

**New this year:**

Submit **your** Agency’s Profit & Loss Statement for the past grant fiscal year (7/1/16-6/30/17).

**UWGCV is not providing a standardized spreadsheet for this.**

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

Federal Poverty Levels – Tables for Annual, Monthly & Hourly Wages

Source: Wisconsin Council on Children & Families

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

**2017:** <http://www.wisconsinbudgetproject.org/2017-federal-poverty-levels>

**If you have more questions or need additional information:**

Education	Kari Stroede Director of the Successful Children’s Network	<a href="mailto:kstroede@uwgcv.org">kstroede@uwgcv.org</a>
Financial Stability	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	Contact any of the above Directors	

All Directors can also be contacted by calling the UWGCV 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).)*