2019 MEMBER AGENCY REPORTING GUIDE

UNITED WAY OF GREATER ST. LOUIS

DEADLINE: Friday, April 19, 2019 @ 5 PM

Helping people. United Way Greater St. Louis

TABLE OF CONTENTS

Note: In the electronic version of the Reporting Guide each item above is hyperlinked to the corresponding page.

Items new for 2019 are highlighted in yellow

I. Executive Director Reporting Review

All agencies are encouraged to complete United Way reporting as early as possible so that a thorough review can be conducted prior to final submission. Please use the checklist below to help ensure that only accurate and complete information is reported.

Agency leaders should use this checklist upon completion of agency reporting. United Way expects Executive Directors to conduct a final review and give approval of submitted data.

It is helpful to print the entire packet upon completion and review all pages to ensure:

- ☐ Accuracy and quality of information
  - Ensure there are no blanks or typos
  - Use clear and concise writing
- ☐ Client demographics are reported for all direct clients that reside in the United Way 16 county service area
- ☐ The Financial Overview includes unrestricted revenue and expenses only – this should tie to the audit submitted by the agency and the audit analysis completed by United Way
- ☐ Expense/revenue information for each program (also known as the gap analysis) accurately reflects:
  - Expenses associated with the program (including management and general expenses)
  - Revenue associated with the program
    - United Way of Greater St. Louis funding used in the program
    - Revenue generated by program service fees
    - Grants that are restricted to this program
  - **Note** that our system will generate a resultant surplus or deficit that indicates how much money the agency must raise to sustain the program
- ☐ All outcome indicators have a specified target population, measurement tool/method, target %, # of clients in measure, and # of clients that achieved the measure

Please direct questions regarding the technical aspects of the online portal, passwords and logins, and re-opening forms to reporting@stl.unitedway.org.

Questions regarding the content of information submitted during reporting should be directed to your Portfolio Manager/ United Way staff contact. Please see the Panel structure in the Appendices for a list of agencies and corresponding United Way staff contacts.

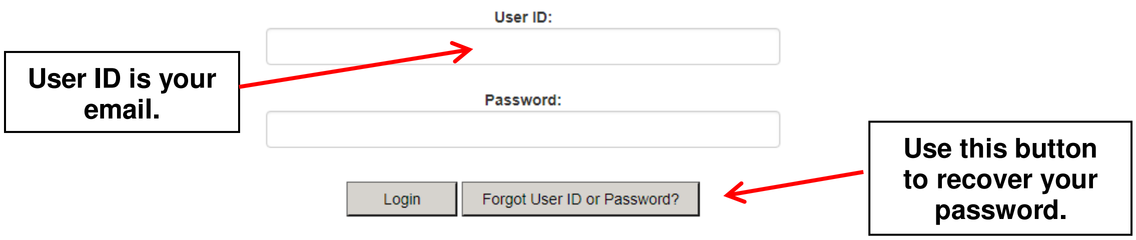
Portfolio Manager/Staff Member	Panels	E-Mail	Phone
Michael Abrams	- Child Welfare - Early Childhood Care & Education - Youth Development	michael.abrams@stl.unitedway.org	(314) 539-4211
Darlene Martin	- Basic Needs & Economic Opportunity - Domestic Violence & Legal Services - Neighborhood Organizations - Senior Services	darlene.martin@stl.unitedway.org	(314) 539-4153
Mary Pryse	- Disabilities Services - Health Services - Mental Health & Substance Abuse	mary.pryse@stl.unitedway.org	(314) 539-4228
Ed Hennessey	Ed continues to be Portfolio Manager for select agencies. See Panel Structure Appendix, p.40.	ed.hennessy@stl.unitedway.org	(314) 625-5294

II. Overview

United Way of Greater St. Louis annually collects data and information from its member agencies for the following purposes: accountability to donors and the community, informing community investments, fundraising, evaluation, research, benchmarking, and knowledge sharing.

III. Accessing Web-Based Reporting

1. You must have a **User ID and Password** to log into the system. If you do not have one, please e-mail reporting@stl.unitedway.org. Your User ID will be your e-mail address. Password is case sensitive.
2. Once you have your User ID and Password, go to the **United Way website** at www.helpingpeople.org
3. Click on **Agency HQ** located in the bottom right corner of the web page.
4. Click on the orange button which reads **Access web-based reporting and instructions.**
5. Select the link under **Annual Member Agency Reporting** to access the login page.
6. Enter your User ID and Password and click the **Login** button. If the login fails, you may repeat up to four times. Please email reporting@stl.unitedway.org if you encounter any difficulties.



IV. Important Tips

1. **System Requirements**

   To use the web-based reporting system, you will need the following:
   - Appropriate web browsers – up to date versions of Internet Explorer, Chrome, and Safari
   - Microsoft Excel Version 2003 or later
   - Ability to create PDFs – free software is available at www.pdf995.com
2. **Only One User per User ID and Password**

   Sharing the same login could result in system problems and difficulty accessing the site. Please send requests for additional reporting contacts to reporting@stl.unitedway.org
3. **System Time-Out Every 30 Minutes – Save Work Continuously**

   This is a secure website with a high volume and rate of data entry. For security reasons, the system times out after 30 minutes of inactivity. Save frequently to avoid data losses.
4. **Difference Between SAVE and SUBMIT Buttons**

   Saving information allows you to return to the entered data and make changes at a later time. Once information has been submitted, it cannot be re-accessed. If you submit your information prematurely, please email reporting@stl.unitedway.org
5. **Do Not Use the BACK Arrow on Your Web Browser**

   Use the SAVE, SUBMIT, and RETURN buttons to navigate through the site. Otherwise, you may be removed from the site and receive an error message.
6. **Spellcheck**

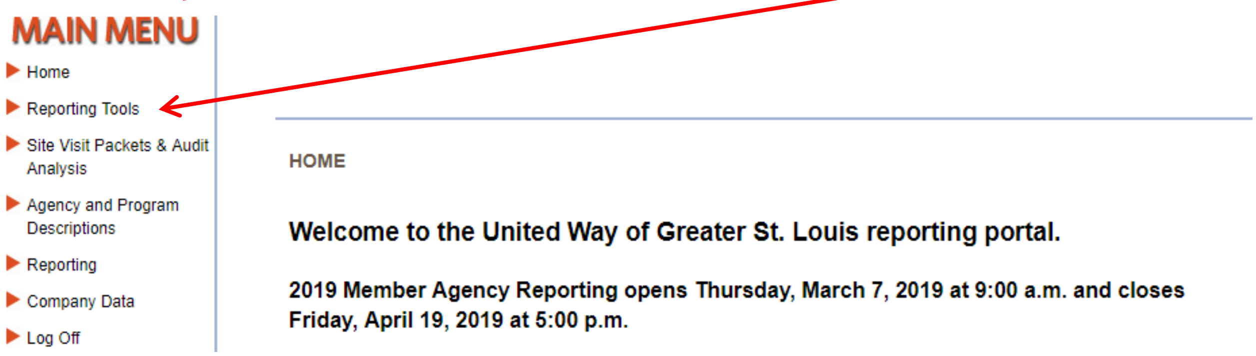
   The system does not contain an embedded spellcheck/grammar check; however, some web browsers do include this feature. It may be helpful to type narrative responses in a word processing system and then copy/paste into the reporting system to minimize the likelihood of spelling and grammar errors.
7. **Symbols and Punctuation**

   Symbols such as bullets and quotations may show up as other symbols, especially when text is pasted into a form. Avoid special punctuation marks or characters whenever possible. You can substitute a dash followed by a space in place of bullets.
8. **Spell Out Acronyms**

   Spell out acronyms, at least with the first use (e.g., FQHC – Federally Qualified Health Center or COA – Council on Accreditation).

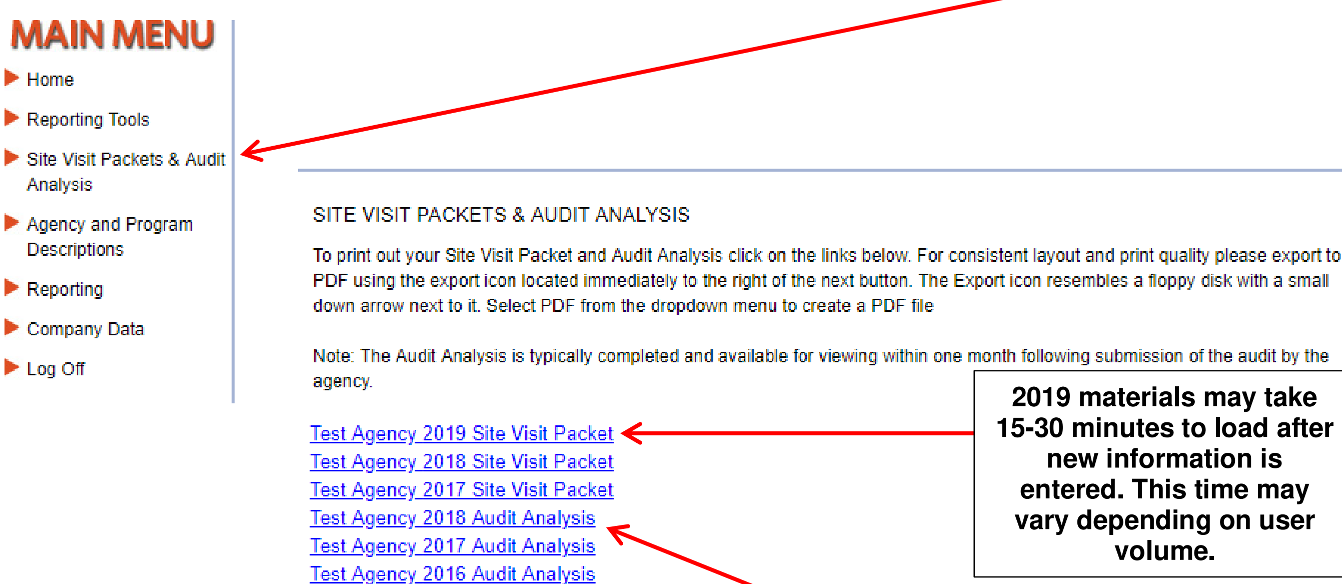
V. Navigation Bar and Reporting Tools

You will use this navigation bar to access all forms that need to be reviewed or completed. Electronic copies of all materials, including this guide, can be found on the Reporting Tools tab.



VI. Printing Site Visit Packet and Audit Analysis

You can print out Site Visit Packets and Audit Analyses anytime during reporting by going to this tab.



2019 materials may take 15-30 minutes to load after new information is entered. This time may vary depending on user volume.

The Audit Analysis is typically completed within one month following submission of the audit by the agency. This time may increase during high audit submission periods.

2019 REPORTING CHECKLIST

	Forms to Review or Submit	Location: Tab / Link	Tree Level	Action Required	Staff Assigned	√ Done
1	Permanent Profile (Agency Description, Mission Statement)	Agency and Program Descriptions	Agency	Review and update if needed		
2	Program Description (Community Need, Target Population, Activities, Program Model)	Agency and Program Descriptions	Program	Review and update if needed for all programs		
3	Administrative Profile	Reporting > Reporting	Agency	Complete and submit		
4	Board Member, Volunteer & Employee Demographics	Reporting > Reporting	Agency	Complete and submit		
5	Client Demographics	Reporting > Reporting	Agency	Complete and submit		
6	Agency Financials	Reporting > Reporting	Agency	Complete and submit		
7	Cobranding End-of-Year Report 2019	Reporting > Reporting	Agency	Complete and submit		
8	Program Profile	Reporting > Reporting	Program	Complete and submit for all programs		
9	Outcome Indicators	Reporting > Reporting	Program	Complete and submit for all programs		
10	Board Roster	Reporting Tools (spreadsheet) Reporting > Board Roster (upload)	Agency	Download template, complete spradsheet and upload		
11	Organizational Chart	Reporting > Organizational Chart (upload)	Agency	Upload 8-1/2” x 11” PDF		
12	Company Data	Company Data	Agency	Enter data and save		

Note: There is no MAP Progress Report to complete this year.

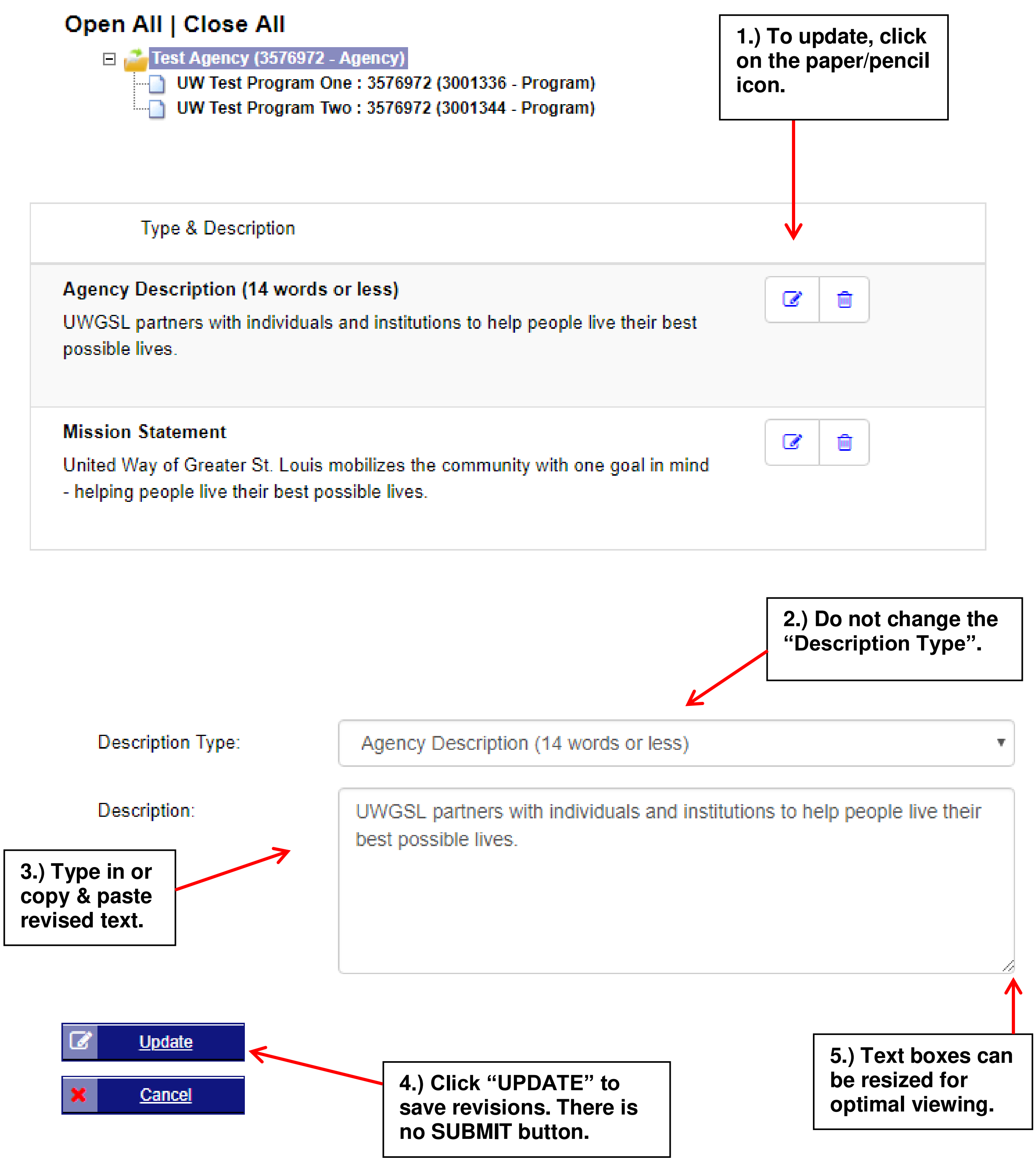
The system lets you know the **Status** of your forms, indicating whether it is Outstanding or Completed

	Section	Status
	Administrative Profile	Outstanding
	Board Member, Volunteer & Employee Demographics	Outstanding
	A. Total Clients Served (Direct and Indirect) (Total = 1900)	Outstanding
	B. Gender (Direct Clients) (Total = 1000)	Outstanding

1. Permanent Profile (Tab: Agency and Program Descriptions, Level: Agency)

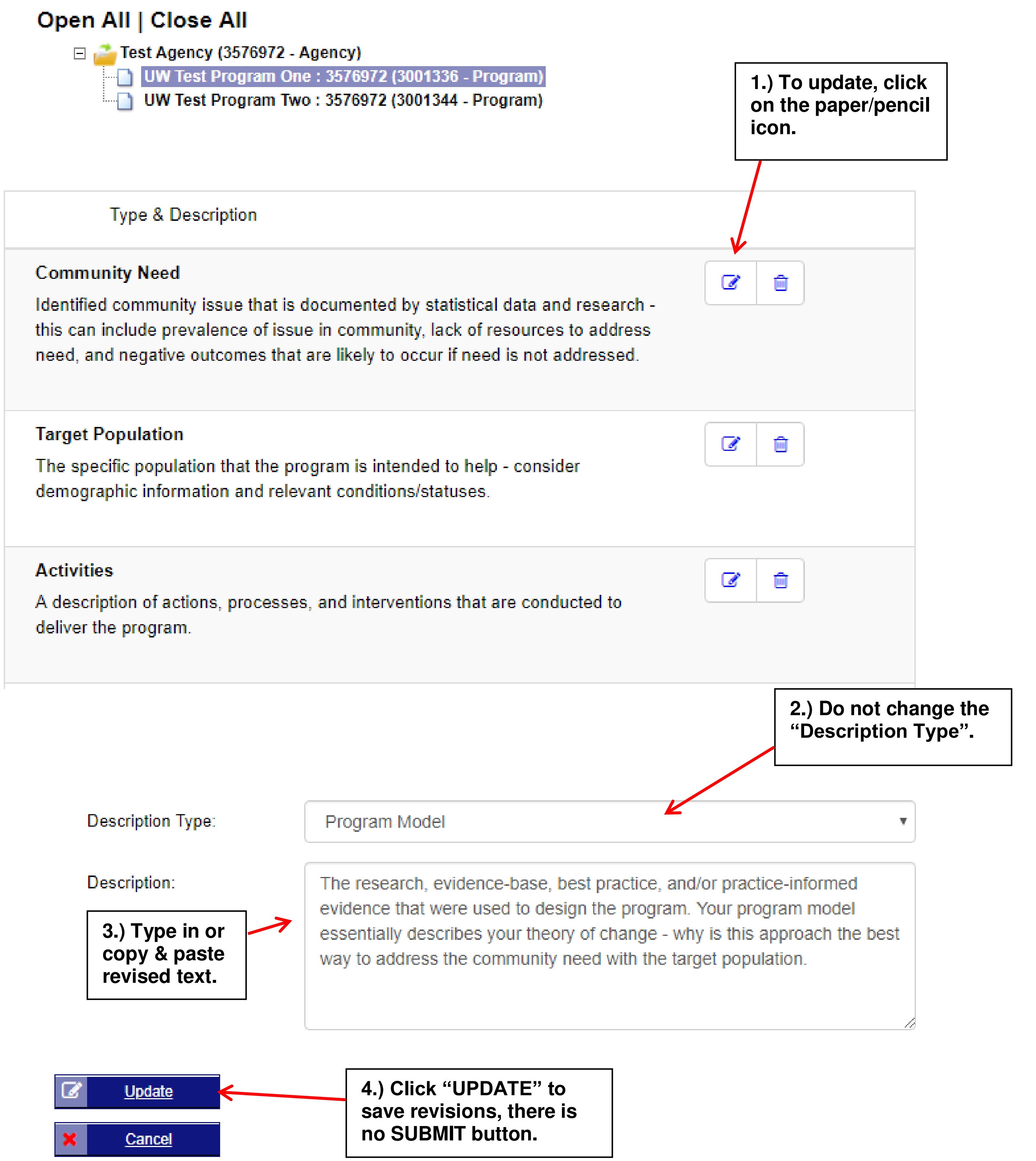
Each agency has a tree structure with two levels: **AGENCY and PROGRAMS**. **Please note that all program tree structure changes were due to Portfolio Managers by February 15, 2019. Further changes will not be made in this reporting year.**

To review and update the Permanent Profile ensure that you are at the AGENCY level of the tree structure. The "agency description" and "mission statement" have been pre-populated from information that the agency submitted previously. Review this information and update as needed.



2. Program Description (Tab: Agency and Program Descriptions, Level: Program)

To access the program description, make sure you are at the PROGRAM level of the agency's tree structure. Remember, all program tree structure changes were due to Portfolio Managers by February 15, 2019. Further changes will not be made in this reporting year. Program descriptions, including "community need", "target population", "activities", and "program model" have been pre-populated from information previously submitted by the agency. Review this information for each program and update accordingly.



3. Administrative Profile (Tab: Reporting > Reporting, Level: Agency)

EXECUTIVE DIRECTOR CELL PHONE

1. Please provide the Cell Phone Number of the Executive Director. *This information will not be published or distributed and is used for emergency purposes only.*

ACCREDITATION

1. Is the agency accredited? (e.g., COA, CARF, JCAHO, etc.) Select Yes, No, or NA.
   Note: Licensing boards and the Better Business Bureau are NOT accrediting bodies
   a. If yes, list the accrediting body(s) and expiration date(s):

2. Is your agency subject to review by your national organization? Select Yes, No, or NA.
   a. If yes, what is your dues formula?

BOARD OF DIRECTORS

1. Enter the Full Name of the current Board Leader:
2. Enter the Title of the Board Leader as it should appear on the Site Visit Packet:
3. Enter the Preferred E-mail Address of the Current Board Leader:
4. Dates of Board Meetings conducted in the last year separated by semi-colons (i.e., 01/15/18; 03/20/18; etc.):
5. List the names of all standing Board committees with current number of Board Members and Non-Board Members separating committees with semi-colons (i.e. Finance Committee, 3 Board Members and 1 Non-Board Member; Executive Committee, 4 Board Members; etc.) (200 word maximum):
6. List the names of all Ad Hoc Board committees with the current number of Board Members and Non-Board Members, separating committees with semi-colons (100 word maximum):
7. Does the Board conduct a periodic evaluation of its individual and collective performance? Select Yes or No.
   a. If yes, briefly describe the Board performance evaluation process including frequency and whether evaluation process includes individual, collective, and/or committee performance (200 word maximum).
   b. If yes, please select the last date conducted.
8. Does the Board conduct a performance evaluation of the agency's executive director? Select Yes or No.
   a. If yes, briefly describe the executive director performance evaluation process including frequency (200 word maximum):
   b. If yes, please select the last date conducted.
9. Is there a succession plan in place for Board Leadership? Select Yes or No.
   a. If yes, please select the last date conducted.
10. Is there a succession plan that addresses staff leadership? Select Yes or No.
    a. If yes, please select the last date reviewed/revised.
11. Describe any changes to agency policies implemented by the Board or Board composition during the last year. (200 word maximum):

STRATEGIC PLAN

1. Strategic Plan start and end dates – include both month and year (e.g., January 2017 – December 2020):
   a. List long-term goals of the Strategic Plan (200 word maximum):
   b. List current year goals of the Strategic Plan (200 word maximum):

FINANCE

1. Was the agency in arrears in submitting any payroll taxes (employee or agency share) to any city, state or federal authorities in its most recently completed fiscal year? Select Yes or No.
    a. If yes, give details about tax delinquency and current status (100 word maximum):

2. Is the agency required to file an IRS Form 990 or 990EZ tax return? Select Yes or No.
    a. If yes, was the most recent IRS Form 990/990EZ tax return submitted on time or within an extension period approved by the IRS? Select Yes or No.
    b. If no, provide details regarding late IRS Form 990/990EZ tax return submission (100 word maximum):

3. Do financial statements that are produced internally track budget to actual financial activity? Check box if yes.

4. Who monitors and/or approves these financial statements? Check all that apply:
    a. Board
    b. Finance Committee
    c. Staff

5. Did the agency receive a **management letter** with its most recent audit? Check box if yes:
    If YES, email the letter to audit@stl.unitedway.org if you have not done so already.

POLICIES AND PLANS

1. Agency has in place policies and procedures which address the following: (Check all that apply.)
    a. Accounting
    b. Affirmative Action
    c. Board members/meetings
    d. Compensated absences (includes limitation and consecutive vacation days)
    e. Compliance with laws
    f. Conflict of interest (board, volunteers, staff)
    g. Code of conduct and ethics
    h. Financial
    i. Fundraising practices
    j. Gift acceptance policies (board, volunteers, staff)
    k. Internal controls
    l. Operating reserve achievement/maintenance
    m. Operations manual
    n. Personnel (hiring, responsibilities, supervision, performance evaluation)
    o. Program
    p. Prohibition of unlawful harassment
    q. Prohibition of unlawful discrimination
    r. Safety
    s. Volunteer
    t. Whistleblower protection

2. Agency has in place plans which address the following: (Check all that apply.)
    a. Annual operating (ties to strategic plan)
    b. Board recruitment
    c. Business continuity plan
    d. Communications/marketing
    e. Development (fundraising)
    f. Disaster and evacuation
    g. Diversity
    h. Facilities
    i. Investment (including operating reserves)
    j. Risk management
    k. Strategic
    l. Succession
    m. Volunteer management

TRENDS

1. Please list any data collection/analysis tool or software that your agency uses (Apricot, Salesforce, ETO, Access, Excel etc.).
2. Has your agency experienced an increase in demand for services in the last six months? Select response from drop down menu: Yes, significant / Yes, moderate / Yes, slight / No, same / No, decrease
3. If yes, what services have shown the greatest demand? (Check all that apply.)
   a. At-risk youth services
   b. Clothing
   c. Counseling/mental health services
   d. Domestic violence services
   e. Employment services
   f. Financial assistance
   g. Food
   h. Foreclosure prevention/intervention
   i. Healthcare (includes RX assistance)
   j. Home repair
   k. Housing (i.e., obtaining permanent housing)
   l. Legal assistance
   m. Mortgage assistance
   n. Rent assistance
   o. Transportation
   p. Utility assistance
   q. Other - If other, please explain:
4. Will your agency be able to meet this demand? Select Yes or No.
5. Based on the economic conditions, what changes have you made or plan to make? (Check all that apply.)
   a. Eliminate programs
   b. Increase services
   c. Increase staff
   d. Layoff staff
   e. Merge with another agency
   f. More fundraising
   g. Re-allocate assets
   h. Reduce expenses
   i. Reduce services
   j. Reduce staff hours
   k. Use reserves
   l. Other - If other, please explain:
6. What do you see as the most significant trends currently impacting health and human services in our region? List the top 3 trends affecting your clients, agency, and/or community.
7. Does your agency provide financial education to your clients? Select Yes or No.
   a. If yes, please estimate how many individuals received one or more hours of financial education last year (individual session or group classes).
8. Please estimate the number of direct clients your agency served last year who lived below the federal poverty line.
9. Please estimate the number of direct clients your agency served last year who were uninsured or underinsured.
10. Please estimate the number of direct clients your agency served last year who were Bosnian.
11. Does your agency have someone on staff who handles government affairs/issues? Select Yes or No.
    a. If yes, please give the full name of the main staff person who handles government affairs/issues.
    b. If yes, please give the job title of the main staff person who handles government affairs/issues.
    c. If yes, please give the email address of the main staff person who handles government affairs/issues.
12. Please give the name, job title, and email address of your agency's main staff person who handles/oversees volunteer management.
    a. Full name of the main staff person who handles/oversees volunteer management.
    b. Job title of the main staff person handles/oversees volunteer management.
    c. Email address of the main staff person who handles/oversees volunteer management.

13. Service 2 Go is an offering of UWGSL's Volunteer Center that provides an opportunity for company volunteers to assemble materials on-site which will be delivered to local agencies to help meet critical needs.

    Please see the description of available Service 2 Go Kits/Items below and indicate the number of kits/items your organization could use to benefit clients over the next year.

    Please note that your response does NOT guarantee that your organization will receive Service 2 Go kits. While the UWGSL Volunteer Center hopes to provide this resource to all interested agencies, we cannot yet determine the amount or type of kits that will be available. Our hope is to use this information to best direct volunteer efforts and kits.

    a. Back-To-School Packs (Backpack with school supplies) — # of kits that would benefit your clients
    b. Smile Kits (Dental health supplies) — # of kits that would benefit your clients
    c. Reading Buddies (Items to promote children's literacy) — # of kits that would benefit your clients
    d. Lab Buddy (Items to promote children's interest in science) — # of kits that would benefit your clients
    e. New Mom Kit (Supplies to care for baby and mother) — # of kits that would benefit your clients
    f. Hygiene Kit (Toiletries) — # of kits that would benefit your clients
    g. Junior Gym Kit (Water bottle, undergarments, deodorant) — # of kits that would benefit your clients
    h. Comfort Kit (Kleenex, lip balm, wipes, games, snacks) — # of kits that would benefit your clients
    i. Children's Bicycles — # of children's bicycles that would benefit your clients

ANTI-TERRORISM CERTIFICATION
In compliance with the USA Patriot Act and other counterterrorism laws and United Way Worldwide's recommendation, the United Way of Greater St. Louis requires that the Executive Director of each member agency annually certify on behalf of the member agency that all United Way funds and donations will be used in compliance with all applicable anti- terrorist financing and asset control laws, statutes and executive orders. Please type either "YES" or "NO" in space below. By typing "YES", the Executive Director attests to the member agency's compliance with the United Way counterterrorism mandate above.

MEMBER AGENCY AGREEMENT
Please check either "YES" or "NO". By checking "YES", the Executive Director attests to the member agency's compliance with the United Way Member Agency Agreement below.
The parties to this Agreement believe that:

1. A strong community has a system of quality non-profit organizations that offer health and human services that improve the quality of people's lives;
2. Federated fundraising is an effective way to raise community dollars for health and human services; and
3. The community's interest is best served by working together.

The United Way and the Agency each agrees on behalf of itself to:

1. Utilize the Quality Standards as a measure of best practices and actively implement strategies to achieve and maintain organizational strength.
2. Maintain its status as a 501(c)3 tax-exempt, charitable, not-for-profit organization.
3. Be governed by a board of directors of at least 12 people.
4. Comply with applicable federal, state and local laws.
5. Inform the other party promptly of developments or problems likely to affect its close working relationship with the other party, or which might reasonably be expected to be of interest or concern to the other party.
6. Recognize and respect the other party's status as an independent organization while working cooperatively in the best interests of each other and the community.

United Way agrees to:

a. Implement a community investment strategy that strengthens health and human services in Missouri and Illinois.
b. Establish a realistic United Way campaign goal, giving consideration to agencies' needs, community resources and probable response, and economic conditions and trends.
c. Organize, direct and conduct a region-wide campaign.
d. Promote its member agencies and their programs and services.

The Agency agrees to:

a. Comply with and demonstrate to the United Way achievement of the Quality Standards.
b. Submit reporting required by United Way by the stated deadline.
c. Adhere to all United Way policies and procedures in effect from time to time relating to member agencies.
d. Portray the Agency's close working relationship with United Way through active cobranding efforts in a way that enhances the United Way's visibility and reputation.
e. Participate in the United Way campaign by soliciting the Agency's employees and providing trained representatives to speak on behalf of United Way during the campaign.
f. Submit an application to participate in the Combined Federal Campaign, as appropriate.

All references in this Agreement to the "Quality Standards" mean the Quality Standards established by the United Way in its discretion for its member agencies from time to time. United Way agrees to give prompt written notice to Agency of any material change in the Quality Standards.

It is the intent of the parties that they will work closely together to accomplish the purposes of this Agreement. Nevertheless, the parties are not partners or joint ventures from a legal perspective nor is the legal relationship between the parties one of principal-agent. Neither party is authorized to enter into or create a binding obligation of the other party.

This Agreement may not be amended except by written agreement between United Way and Agency. All notices under this Agreement shall be given in writing to the address indicated below to the attention of the president or to such other address and attention as shall be furnished in writing by either party to the other. Any waiver by either party of any breach by the other party of any provision of this Agreement must be in writing and no such waiver shall be deemed to be a waiver of any other breach of that provision or any other similar or dissimilar breach. This Agreement, the Quality Standards and the policies and procedures of United Way in effect from time to time contain the entire agreement of the parties with respect to the subject matter hereof. This Agreement shall be binding upon and inure to the benefit of the parties and their successors; provided however that Agency may not assign any of its rights or delegate any of its duties without the prior written consent of United Way. This Agreement shall be governed by the internal laws of the State of Missouri.

This Agreement shall continue in effect until the Agency's membership in United Way is terminated by the United Way or the Agency withdraws from membership in United Way. Any such termination or withdrawal must be in writing and may be with or without cause.

4. Board Member, Volunteer, & Employee Demographics (Tab: Reporting > Reporting, Level: Agency)

BOARD MEMBERS

Note: ** Indicates a mandatory item. If there is no reportable data, please enter "0".

1. **Enter the total number of Board Members currently serving.
   a. Enter today's date:

2. **Enter the gender of the Board Members reported above. The total entered here must equal the total as reported in #1 above.
   a. Females:
   b. Males:
   c. Other:

3. **Enter the race/ethnicity of Board Members as reported above. The total entered here must equal the total as reported in #1 above.
   a. African American:
   b. Asian:
   c. Bi/Multi-racial:
   d. Caucasian:
   e. Hawaiian/Pacific Islander:
   f. Hispanic/Latino/a/x:
   g. Native American/Alaskan Native:
   h. Other:

4. **Enter the total number of Board Members that represent each age range. The total entered here must equal the total as reported in #1 above.
   a. Below 20 years:
   b. Between 20 to 39 years:
   c. Between 40 to 65 years:
   d. Over 65 years:

5. **Enter the total number of Board Members that represent each years of service range. The total entered here must equal the total as reported in #1 above.
   a. Below 2 years of service:
   b. Between 2 to 6 years:
   c. Between 7 to 10 years:
   d. 11 years of service or more:

EMPLOYEES

1. **Enter the total number of people who were employed at any time during your past fiscal year (normally ties to year-end payroll records):

2. **What is the approximate number of Full Time Equivalent (FTE) positions normally employed? (FTE is defined as the number of total hours worked divided by the maximum number of compensable hours in a work year as defined by law. For example, if the work year is defined as 2,080 hours, then one worker occupying a paid full time job is equivalent to one FTE. Two employees working for 1,040 hours each are equivalent to one FTE between the two of them.)

3. Does your agency have significant seasonal changes in its staffing patterns? Check box if yes:
   a. If yes, what is the approximate number of FTE positions employed during high seasonal times?

4. **Enter the gender of the staff reported above. The total entered here must equal the total as reported in #1 above.
   a. Female:
   b. Male:
   c. Other:

5. **Enter the race/ethnicity of staff as reported above. The total entered here must equal the total as reported in #1 above.
   a. African American:
   b. Asian:
   c. Bi/Multi-racial:
   d. Caucasian:
   e. Hawaiian/Pacific Islander:
   f. Hispanic/Latino/a/x:
   g. Native American/Alaskan Native:
   h. Other:

VOLUNTEERS

Note: ** Indicates a mandatory item. If there is no reportable data, please enter "0".

1. **Enter the total number of each of the following types of volunteers for your past fiscal year.
   a. Episodic volunteers who came once or very few times for a particular event or purpose (may be estimated):
   b. On-going direct service volunteers whose service was both consistently provided during some portion of the year and related directly to program services on behalf of clients:
   c. Administrative and other on-going service volunteers who are not reported in statistics above excluding Board and committee volunteers:
   d. Board and committee volunteers:
   e. Total number of volunteer hours (includes episodic, on-going direct service, administrative/other on-going service, Board/committee volunteers):

5. Client Demographics (Tab: Reporting > Reporting, Level: Agency)

Report the following demographics for clients served during your last completed fiscal year. Demographics should be reported for all programs.

"Client Demographics" sections should include clients from ALL programs.

A. Total Clients Served

Direct Clients In UW Service Area
Direct Clients Out of UW Service Area
Indirect Clients

Direct Clients: These clients generally receive extensive and/or long-term services in small groups or one-on-one. Intake records or other reliable methods of collecting information on these clients are maintained. Clients in this category are always unduplicated.

- In UW Service Area – Clients who reside in the United Way 16 county service area
- Outside of UW Service Area – Clients who do not reside in the United Way 16 county service area

Indirect Clients: These clients generally receive one-time or infrequent services from the agency and the services may be provided in a group setting. Detailed records for each client are not maintained, although a basic count of the number of participants and demographic estimates should be available. Demographic information is typically difficult or impossible to collect. Thus, if you do not have demographic information, the client is likely an indirect client.

Sections B-F should include unduplicated, direct clients that reside in the 16 county United Way service area.

The number entered in these sections should equal the "Direct Clients In UW Service Area" in Section A.

B. Gender (Direct Clients)

Female
Male
Other
Unknown Gender

C. Race/Ethnicity (Direct Clients)

African American	Hispanic/Latino/a/x
Asian	Native American/Alaskan Native
Bi/Multi-Racial	Other
Caucasian	Unknown Race/Ethnicity
Hawaiian/Pacific Islander	

D. Age (Direct Clients)

0 to 2 Years	35 to 54 Years
3 to 5 Years	55 to 64 Years
6 to 9 Years	65 to 74 Years
10 to 14 Years	75 to 84 Years
15 to 19 Years	85 and Older
20 to 34 Years	Unknown Age

E. Annual Household Income (Direct Clients)

$0 to $9,999	$30,000 to $49,999
$10,000 to $14,999	$50,000 to $99,999
$15,000 to $19,999	$100,000 and Greater
$20,000 to $29,999	Unknown Income

F. Zip Code (Direct Clients) Leave blank if none.

Note: See Reporting Tools tab for a spreadsheet of zip codes categorized by county

62001	62062	62230	62281	63015	63068	63123	63179	63379
62003	62063	62231	62282	63016	63069	63124	63180	63381
62006	62065	62232	62283	63017	63070	63125	63182	63383
62009	62067	62233	62285	63019	63071	63126	63188	63385
62010	62069	62234	62286	63020	63072	63127	63190	63386
62012	62070	62236	62288	63021	63073	63128	63195	63387
62013	62071	62236	62289	63022	63074	63129	63197	63389
62015	62074	62237	62292	63023	63077	63130	63198	63390
62016	62079	62238	62293	63024	63079	63131	63199	63627
62019	62081	62239	62294	63025	63080	63132	63301	65041
62021	62082	62240	62295	63026	63084	63133	63302	65441
62022	62084	62241	62297	63028	63087	63134	63303	Unknown Zip Codes
62023	62085	62242	62298	63030	63088	63135	63304	
62024	62087	62243	62355	63031	63089	63136	63332	
62025	62088	62244	62361	63032	63090	63137	63333	
62026	62090	62245	62366	63033	63091	63138	63334	
62027	62092	62248	62511	63034	63099	63139	63338	
62028	62093	62249	62626	63037	63101	63140	63341	
62030	62095	62250	62630	63038	63102	63141	63342	
62031	62097	62252	62640	63039	63103	63143	63343	
62033	62098	62253	62649	63040	63104	63144	63344	
62034	62201	62254	62667	63041	63105	63145	63346	
62035	62202	62255	62672	63042	63106	63146	63347	
62036	62203	62256	62674	63043	63107	63147	63348	
62037	62204	62257	62683	63044	63108	63150	63349	
62040	62205	62258	62685	63045	63109	63151	63351	
62044	62206	62259	62690	63047	63110	63155	63357	
62045	62207	62260	62694	63048	63111	63156	63362	
62046	62208	62261	62708	63049	63112	63157	63363	
62047	62215	62264	62801	63050	63113	63158	63365	
62048	62216	62265	62916	63051	63114	63160	63366	
62050	62217	62266	63001	63052	63115	63163	63367	
62052	62218	62269	63005	63053	63116	63164	63368	
62053	62219	62271	63006	63055	63117	63166	63369	
62054	62220	62272	63010	63056	63118	63167	63370	
62058	62221	62277	63011	63060	63119	63169	63373	
62059	62222	62278	63012	63061	63120	63171	63376	
62060	62223	62279	63013	63065	63121	63177	63377	
62061	62225	62280	63014	63066	63122	63178	63378	

Only report zip code data for clients that reside in the UW 16 county service area or have an unknown zip code.

6. Agency Financials (Tab: Reporting > Reporting, Level: Agency)

Financial forms are located here.

	Section	Status
	Administrative Profile	Outstanding
	Board Member, Volunteer & Employee Demographics	Outstanding
	A. Total Clients Served (Direct and Indirect) (Total = 0)	Outstanding
	B. Gender (Direct Clients in UW Service Area) (Total = 0)	Outstanding
	C. Race/Ethnicity (Direct Clients in UW Service Area) (Total = 0)	Outstanding
	D. Age (Direct Clients in UW Service Area) (Total = 0)	Outstanding
	E. Annual Household Income (Direct Clients in UW Service Area) (Total = 0)	Outstanding
	F. Zip Code (Direct Clients in UW Service Area) (Total = 0)	Outstanding
	2019 Budget	Outstanding
	2018 Audited Financials	Outstanding
	2018 Pre-Audit Financials	Outstanding
	2017 Audited Financials	Outstanding
	Cobranding End of Year Report	Outstanding

Because agencies will only complete 2018 Audited or 2018 Pre-Audit financials, one will show as outstanding.

For agencies with Fiscal Year ending **July through December**, complete the following Agency Financials:

- 2019 - Budget
- 2018 - Pre-Audit (If you already have your 2018 Audit, please complete Audited instead of Pre-Audit)
- 2017 - Audited

For agencies with Fiscal Year ending **January through June**, complete the following Agency Financials:

- 2019 - Budget
- 2018 - Audited
- 2017 - Audited

Item	Description	Amount	Side
11	United Way of Greater St. Louis	$150,000.00	Income
12	Other United Ways	$120.00	Income
13	Individual Donors	$100,000.00	Income
14	Corporate & Foundation Grants	$350,000.00	Income
20	Special Events	$20,000.00	Income
30	Government Grants & Fees	$15,000.00	Income
40	Membership Dues Revenue	$5,000.00	Income
50	Program Service Fee Revenue	$4,000.00	Income
60	Investment Income	$25,000.00	Income
70	Miscellaneous/Other Revenue	$7,500.00	Income
100	Salaries, Benefits, Taxes, & Contract Staff	$200,000.00	Expense
110	Occupancy Related Expenses	$25,000.00	Expense
120	Other Operating Expenses	$5,000.00	Expense
130	Assistance to Individuals	$25,000.00	Expense
140	Dues to National Organization	$50,000.00	Expense
150	Depreciation Expense	$250,000.00	Expense
80	Other Unrestricted Activity (Gain or Loss)	$3,500.00	Income
	Total Income	$680,120.00	
	Total Expense	$555,000.00	
	Total Surplus/Deficit	$125,120.00	

Report funding from United Way of Greater St. Louis (page 19 lists what comprises UWGSL funding) and other United Way locations separately.

IMPORTANT

The Total Surplus/Deficit here should exactly match the Unrestricted Surplus/Deficit in the agency's audit.

When entering audit and pre-audit data, use the "Unrestricted" column from the audit, as in this example.

		Unrestricted		Temporarily Restricted		Total
Revenue						
Community Living Service Fees						
Group Home	$	665,458	$	-	$	665,458
Supported Living Arrangements		6,828,493		-		6,828,493
Statewide Services Service Fees						
Southeast Missouri		753,944		-		753,944
Central Missouri		1,544,670		-		1,544,670
Southwest Missouri		841,747		-		841,747
Adult Day Services Service Fees						
Supported Employment		449,960		-		449,960
Community Based Services		530,633		-		530,633
EXCELL		733,433		-		733,433
Training Services		288,459		-		288,459
Clinical Services		314,576		-		314,576
Individual Support Services		435,817		-		435,817
Educational Services		53,738		-		53,738
Other		6,129		-		6,129
Total Revenue		13,447,057		-		13,447,057
Public Support						
Contributions		252,253		420		252,673
Grants		113,534		397,437		510,971
Special Events		703,891		-		703,891
Less: Cost of direct benefits to donors		(138,770)		-		(138,770)
Total Public Support		930,908		397,857		1,328,765
Net Assets Released From Restrictions:		560,433		(560,433)		-
Total Revenue and Public Support		14,938,398		(162,576)		14,775,822
Functional Expenses						
Program Services		12,042,035		-		12,042,035
Administration		2,217,313		-		2,217,313
Fund Development		370,392		-		370,392
Total Expenses		14,629,740		-		14,629,740
Change in Net Assets		308,658		(162,576)		146,082
Net assets, beginning of year		24,318		257,196		281,514
Net assets, end of year	$	332,976	$	94,620	$	427,596

The Notes to Financial Statements are an integral part of these statements.

3

Financial Overview Example

Fiscal Year End: December 31

Financial Overview

UNRESTRICTED REVENUE	2019 Budget $	%	2018 Audited $	%	2017 Audited $	%	Change from 2017 to 2019 $	%
(UW, Indiv, Corp & Fdn Grants, Spec. Evt)	**646,300**	**90 %**	**576,580**	**82 %**	**271,200**	**83 %**	**375,100**	**138 %**
*United Way of Greater St. Louis	155,000	22 %	155,000	22 %				
Other United Ways	1,300	0 %	580	0 %	150,000	46 %		
Individual Donors	110,000	15 %	98,000	14 %	1,200	0 %		
Corporate & Foundation Grants	355,000	50 %	302,000	43 %	100,000	31 %		
Special Events	25,000	3 %	21,000	3 %	20,000	6 %	5,000	25 %
Government Grants & Fees	20,000	3 %	19,000	3 %	15,000	5 %	5,000	33 %
Membership Dues Revenue	6,000	1 %	55,000	8 %	5,000	2 %	1,000	20 %
Program Service Fee Revenue	5,000	1 %	7,000	1 %	4,000	1 %	1,000	25 %
Investment Income	30,000	4 %	31,000	4 %	25,000	8 %	5,000	20 %
Miscellaneous/Other Revenue	8,000	1 %	11,000	2 %	7,500	2 %	500	7 %
Total Unrestricted Revenue	**715,300**	**100 %**	**699,580**	**100 %**	**327,700**	**100 %**	**387,600**	**118 %**
EXPENSES								
Salaries, Benefits, Taxes, & Contract Staff	250,000	43 %	254,000	44 %	100,000	22 %	150,000	150 %
Occupancy Related Expenses	30,000	5 %	34,000	6 %	25,000	5 %	5,000	20 %
Other Operating Expenses	6,000	1 %	6,000	1 %	5,000	1 %	1,000	20 %
Assistance to Individuals	30,000	5 %	29,000	5 %	25,000	5 %	5,000	20 %
Dues to National Organization	5,000	1 %	4,000	1 %	50,000	11 %	-45,000	-90 %
Depreciation Expense	255,000	44 %	254,000	44 %	250,000	55 %	5,000	2 %
Total Expenses	**576,000**	**100 %**	**581,000**	**100 %**	**455,000**	**100 %**	**121,000**	**27 %**
Other Unrestricted Activity (Gain or Loss)	4,255		5,785		3,500			
NET SURPLUS/DEFICIT	143,555		124,365		-123,800			

*Includes Community Investment Division, Combined Federal Campaign, ACTS Capacity-Building Grant, IDA Match Funds, Child Care Match & Scholarship, One-Time Grants, Southwest Illinois Division, Tri-Cities Area Division, and Donor Designations.

	2019	2018	2017
Community Investment Division	$175,000	$170,000	$160,000
Southwest Illinois Division	$0	$27,000	$26,000
Tri-Cities Area Division	$0	$17,000	$16,000
ACTS Capacity-Building	$2,500	$1,700	$1,600
Child Care Match and Scholarships			
Combined Federal Campaign	$0	$2,700	$2,600
One-Time Grants			

United Way populates this financial data – it is not entered by the agency.

United Way of Greater St. Louis, Other United Ways, Individual Donors, and Corporate & Foundation Grants are reported as separate income line items. United Way of Greater St. Louis income may comprise all funding received including, but not limited to:

a. Community Investment Division Allocation
b. Combined Federal Campaign (CFC)
c. Southwest Illinois Division Allocation
d. Tri-Cities Area Division Allocation
e. Agency Consultation, Training and Support (ACTS) Capacity-Building Grant
f. Child Care Match & Scholarship
g. One-Time Grants
h. Donor Designations
i. IDA Match Funds

Note: There are two lines for United Way funding. Money from the United Way of Greater St. Louis should be reported under “United Way of Greater St. Louis” and any funds received from other area United Ways should be reported under “Other United Ways”.

7. Cobranding End of Year Report (Tab: Reporting > Reporting, Level: Agency)

The Cobranding End of Year Report is to be completed for the period January 1, 2018 through December 31, 2018.

Please note that agencies are not required to attach cobranding documentation and only need to complete the Cobranding End of Year Report.

MEMBERSHIP REQUIREMENTS:

1. Agency displays/includes the "Proud Member of United Way" logo on materials:

    a. Is the "Proud Member of United Way" logo displayed at all appropriate facilities and main office locations? Select Yes or No.
    Note: Confidential locations and private homes do not require that the logo be displayed.
    If "no" is selected for 1.a.
    - If the "Proud Member of United Way" logo is not displayed on all appropriate facilities and main office locations please explain why (50 word maximum):

    b. Does the agency have a website? Select Yes or No.
    If "yes" is selected for 1.b.
    - Please provide the agency's website (URL).
    - Is the "Proud Member of United Way" logo displayed on the website? Select Yes or No.
        - If the "Proud Member of United Way" logo is not displayed on the agency website, please explain why (50 word maximum):
    - Is a link to United Way's website (www.helpingpeople.org) provided on the agency's website? Select Yes or No.
        - If a link to the United Way's website is not provided on the agency website, please explain why (50 word maximum):

    c. Does the agency have an annual report? Select Yes or No.
    If "yes" is selected for 1.c.
    - Is the "Proud Member of United Way" logo included in the annual report? Select Yes or No.
        - If the "Proud Member of United Way" logo is not included in the agency's current annual report, please explain why (50 word maximum):

    d. Does the agency distribute a newsletter? Select Yes or No.
    If "yes" is selected for 1.d.
    - Is the "Proud Member of United Way" logo included in the newsletter? Select Yes or No.
        - If the "Proud Member of United Way" logo is not included in the agency newsletter, please explain why (50 word maximum):

    e. Does the agency have letterhead? Select Yes or No.
    If "yes" is selected for 1.e.
    - Is the "Proud Member of United Way" logo included in the agency letterhead? Select Yes or No.
        - If the "Proud Member of United Way" logo is not included in the agency letterhead, please explain why (50 word maximum):

    f. Does the agency distribute any brochures? Select Yes or No.
    If "yes" is selected for 1.f.
    - Is the "Proud Member of United Way" logo included in the brochure? Select Yes or No.
        - If the "Proud Member of United Way" logo is not included in brochures, please explain why (50 word maximum):

2. Agency provided trained representatives to speak on behalf of United Way during the campaign? Select Yes or No.

3. Agency ran a United Way campaign for agency employees? Select Yes or No.

8. Program Profile (Tab: Reporting > Reporting, Level: Program)

Complete this form for every program. For questions 3 through 10, report only on clients within United Way's 16 county region.

Only TOTAL direct & indirect client numbers show in site visit packet.

1. How many direct clients were served in this program during your last completed fiscal year?
    a. # of direct clients served that reside within United Way's 16 county region
    b. # of direct clients served that reside outside of United Way's 16 county region
2. How many indirect clients were served in this program during your last completed fiscal year?

For the following Program Profile questions, report only on clients within United Way's 16 county region.

3. Does this program specifically target any of the following populations/services:
    a. LGBTQIA+
    b. Veterans
    c. Obesity prevention/reduction
    d. STEM / STEAM (Science Technology Engineering, Art, Math)
    e. Prevention or treatment of Opioid Use Disorder
    f. Transportation or transportation assistance
4. Approximately how many clients, if any, did you have to turn away or place on a waitlist because of limited capacity?
5. Does this program provide any services to help clients obtain jobs? Select Yes or No. (If yes, additional questions will appear.)
6. What types of employment related services are offered through your agency? (Check all that apply.):
    a. Job readiness (soft skills: e.g., life skills, employment basics, GED classes, resume writing, interview skills, conducting job searches, etc.)
    b. Job training (hard skills: e.g., Microsoft Office, custodial services training, health care services training, etc.)
    c. Job development/placement (matching clients with jobs)
    d. Job retention/employment support (client follow up)
7. How many unduplicated clients received employment related services in 2018 (including job readiness, job training, job development/placement or job retention)?
8. How many clients were served in the program in the following areas?
    a. Job readiness (soft skills: e.g., life skills, employment basics, GED classes, resume writing, interview skills, how to conduct a job search, etc.)
    b. Job training (hard skills: e.g., Microsoft Office, custodial services training, health care services training, etc.)
    c. Job development/placement (matching clients with jobs)
    d. Job retention/employment support (client follow up)
9. How many clients obtained employment in 2018 (if known)?
10. How many clients who received job readiness and/or employment services in 2018 have retained employment for at least 90 days (if known)?
    a. What was the average hourly wage (if known)?
11. List the following financial data for this program's 2019 operating budget:
    a. Expenses to operate program (including fundraising, management & general):
    b. United Way of Greater St. Louis funding allocated to this program:
    c. Revenue generated from program service fees:
    d. Grants that are restricted to this program only:

12. List the following financial data for this program's 2018 actual program expenses:
    a. Expenses to operate program (including fundraising, management & general):
    b. United Way of Greater St. Louis funding allocated to this program:
    c. Revenue generated from program service fees:
    d. Grants that are restricted to this program only:

9. Outcome Indicators (Tab: Reporting > Reporting, Level: Program)

Complete this form for every program. All agencies must select at least one outcome for each program.

1. Select the Field of Service Area that best aligns with this program. (Select one from drop-down list.)
    1) Basic Needs
    2) Behavioral Health
    3) Child Welfare
    4) Disabilities
    5) Disaster Services
    6) Early Childhood
    7) Financial Stability
    8) Legal Services
    9) Physical Health
    10) Senior Services
    11) Violence Prevention
    12) Workforce Development
    13) Youth Development

2. Select the outcome that best aligns with the program activities. You may enter up to five outcomes for each program. For each outcome, provide outcome indicator information by answering a, b, c, d, and e below.

Outcome #1: (select from drop-down list)

1.) Clients achieve publication of research by a peer-reviewed entity (Administrative).
2.) Clients achieve/maintain permanency (reunification, guardianship, adoption).
3.) Clients are born of a healthy birth weight.
4.) Clients are free from law enforcement/juvenile justice involvement or re-offending.
5.) Clients are free from substantiated incidents of child abuse and/or neglect.
6.) Clients are proficient in math.
7.) Clients are proficient in reading.
8.) Clients are promoted to the next grade level.
9.) Clients are ready to enter kindergarten.
10.) Clients are satisfied with services. (Administrative)
11.) Clients are successfully able to manage physical health conditions.
12.) Clients are successfully able to navigate the justice system.
13.) Clients are successfully linked with community services.
14.) Clients avoid bullying behaviors.
15.) Clients avoid illegal/addictive substances that negatively impact their lives.
16.) Clients develop coping, stress management skills.
17.) Clients develop healthy relationships with family members/caregivers.
18.) Clients develop positive friendships with peers.
19.) Clients develop positive self-concept/esteem/confidence/efficacy.
20.) Clients develop/maintain a physically active lifestyle.
21.) Clients develop/maintain healthy eating habits.

Administrative outcomes are intended for programs that do not provide direct service for clients.

22.) Clients develop skills to avoid engaging in risky behaviors.
23.) Clients do not become pregnant or father a child during teen years.
24.) Clients enhance their capacity and performance. (administrative)
25.) Clients enroll in/complete job training, college, or vocational training.
26.) Clients experience a sense of belonging.
27.) Clients experience fewer mental, emotional, and/or behavioral symptoms.
28.) Clients experience no out-of-home placements.
29.) Clients express empathy.
30.) Clients feel less isolated.
31.) Clients feel more hopeful about the future.
32.) Clients gain critical thinking and decision-making skills.
33.) Clients gain knowledge/take action about advocacy/policy issues.
34.) Clients gain knowledge about available community resources.
35.) Clients gain knowledge about behavioral/mental health issues.
36.) Clients gain knowledge about healthy lifestyle habits.
37.) Clients gain knowledge about personal finance and money management.
38.) Clients gain knowledge about pertinent legal rights and obligations.
39.) Clients gain knowledge about physical health conditions.
40.) Clients gain knowledge about safe and healthy relationships.
41.) Clients gain knowledge about service delivery topic. (administrative)
42.) Clients gain knowledge and skills to prevent and respond to emergencies.
43.) Clients gain knowledge/take action to increase disaster preparedness.
44.) Clients gain positive parenting/co-parenting skills.
45.) Clients gain strategies for enhancing safety.
46.) Clients gain/maintain independent living/essential life skills.
47.) Clients graduate from high school, earn a GED, other high school equivalent.
48.) Clients have immediate basic needs met (food, clothing, shelter, etc.).
49.) Clients identify, manage, and appropriately express emotions and behaviors.
50.) Clients improve listening and spoken language abilities.
51.) Clients increase income, savings, assets.
52.) Clients maintain/improve course grades/academic performance.
53.) Clients maintain/improve school attendance/remain in school.
54.) Clients maintain/improve their level of functioning.
55.) Clients maintain/improve their quality of life.
56.) Clients make changes based on knowledge gained. (administrative)
57.) Clients meet or exceed age-appropriate developmental milestones.
58.) Clients obtain employment.
59.) Clients obtain job readiness skills.
60.) Clients pass their classes.
61.) Clients receive routine medical care and age-appropriate immunizations.
62.) Clients recover to their normal lifestyle after a disaster.
63.) Clients remain in/transition to an improved, stable living situation.
64.) Clients retain employment for at least three months.

a. Specific Target Population Measured:
b. Measurement Tool/Method:
c. Target Goal %:
d. # of clients included in the measure:
e. # of clients that achieved indicator:

Be clear about the measurement tool and/or method used to determine a client's achievement of the selected indicator.

Outcome #2: (same list as above)

a. Specific Target Population Measured:
b. Measurement Tool/Method:
c. Target Goal %:
d. # of clients included in the measure:
e. # of clients that achieved indicator:

Outcome #3: (same list as above)

a. Specific Target Population Measured:
b. Measurement Tool/Method:
c. Target Goal %:
d. # of clients included in the measure:
e. # of clients that achieved indicator:

Outcome #4: (same list as above)

a. Specific Target Population Measured:
b. Measurement Tool/Method:
c. Target Goal %:
d. # of clients included in the measure:
e. # of clients that achieved indicator:

Outcome #5: (same list as above)

a. Specific Target Population Measured:
b. Measurement Tool/Method:
c. Target Goal %:
d. # of clients included in the measure:
e. # of clients that achieved indicator:

3. Please share any successes or challenges related to achieving, tracking data, and/or reporting the above outcome indicators and targets.

4. How are program outcomes used? What adjustments, if any, have been made to your agency, program, staffing as a result of your findings? What processes do you have in place to ensure continuous quality improvement?

10. Board Roster (Tab: Reporting Tools > Reporting, Level: Agency)

1. Click on Reporting Tools from the Navigation Bar

2. Click on 2019 Agency Board Roster Template to access the Excel template

2019 AGENCY BOARD ROSTER TEMPLATE

Directions	Expertise Codes	
Save board roster as **"Your Agency Name" 2019 Board Roster.xls"**	E = Evaluation	HR = Human Resources
Select agency name in cell 'D 12' from drop down menu	FM = Facilities Mgmt	IT = Information Technology
Enter each board member's **formal name** in format of **FIRST, MIDDLE, LAST**.	F = Finance	L = Legal
If space is needed for more than 70 board members, complete and attach 2 rosters labeled 1 and 2	FS = Field of Service	PR = Public Relations/Mktg
Enter employer, job title, board position, preferred e-mail, and expertise as applicable. See expertise codes for entry in column 'H' . E-mails are not optional.	FR = Fund Raising	SP = Strategic Planning
Enter work zip code if applicable or home zip code of each board member		
Complete other demographic information using the drop down menus provided		

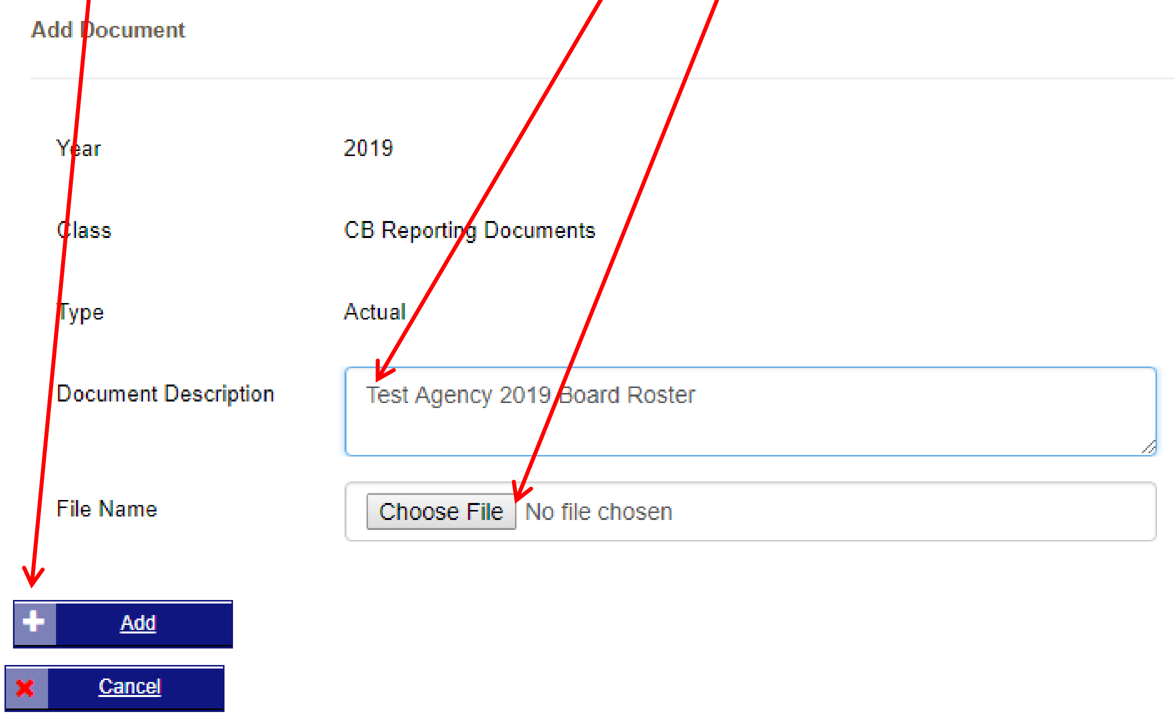
Agency Name: Select Agency Here

Board Member First Name	Middle (if Used)	Board Member Last Name	Suffix	Employer (if applicable)	Job Title (if applicable)	Bd Position (Pres., Treas., etc.)	Preferred E-Mail	Expertise use one or more	Zip Code
Expertise Codes: E= Evaluation; FM = Facilities Mgmt; F=Finance; FS=Field of Service; FR=Fund Raising; HR=Human Resources; IT; L=Legal; PR = PR/Mktg; SP=Strategic Plan									
Micheal	*J.*	*Doe*	*Jr.*	*ABC Company*	*Controller*	*Treas.*	*Micheal.Doe@abc.com*	*F, HR, SP*	*63101*
						BOARD PRESIDENT			

3. Download and save the document as “Agency Name 2019 Board Roster.xls”

Use the correct naming convention.

4. Use this template to enter information about your Board Members as of April 2019
5. If your agency has more than 70 Board Members, complete two templates saving the first as “Agency Name 2019 Board Roster 1.xls” and the second as “Agency Name 2019 Board Roster 2.xls”
6. When complete, go to the Reporting tab and click on Board Roster
7. Click the Add button
8. In the “Document Description” box, name the document name “Agency Name 2019 Board Roster”
9. Click the “Choose File” or “Browse” button located under the description box
10. Locate the document you wish to attach
11. After the location of the document appears in the file name box, click Add button to upload the attachment
12. Once you add the document a Submit button will appear, click this to submit the board roster

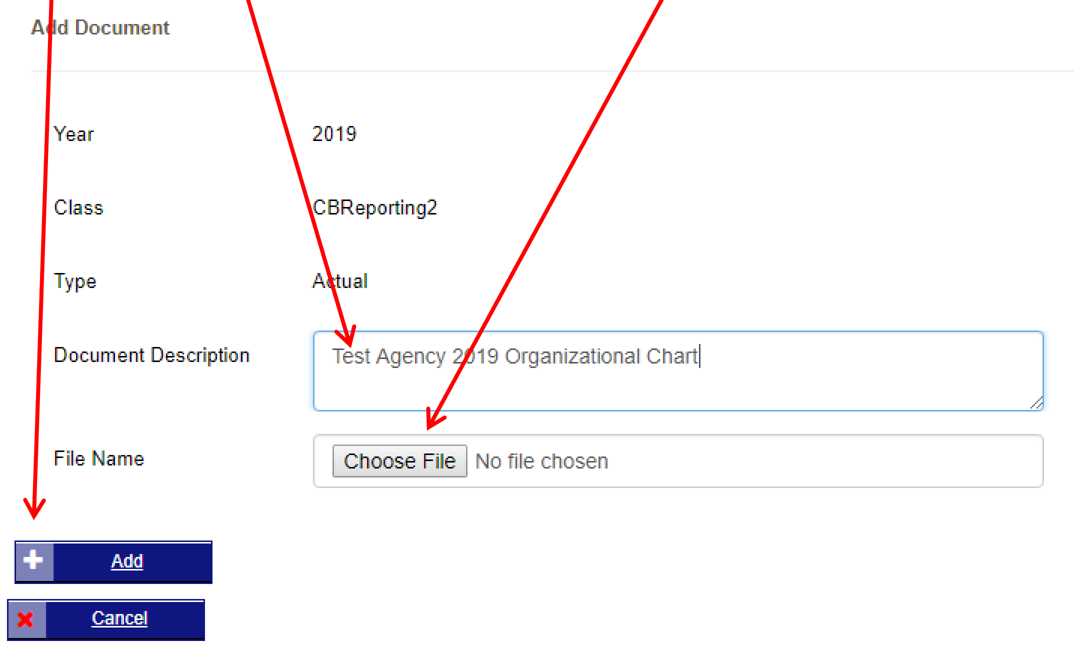


11. Organizational Chart (Tab: Reporting, Level: Agency)

You must attach a current Organizational Chart for your agency that adheres to the following:

a. Your chart must be 8-1/2” x 11”
b. A PDF format is required
c. You can download free software here www.pdf995.com

1. Go to the Reporting tab and click on Organizational Chart
2. Click the Add button
3. In the Description box, name the document name “Agency Name 2019 Organizational Chart”
4. Click the “Choose File” or “Browse” button located under the description box
5. Locate the document you wish to attach
6. After the location of the document appears in the file name box, click Add button to upload the attachment
7. Once you add the document you will see a Submit button appear, click this to submit the organizational chart



12. Company Data (Tab: Company Data, Level: Agency)

Enter the number of Direct Clients served by your agency during the past fiscal year who work at the following companies. Leave blank if none. Click Save when done. The company list for 2019 is located under Reporting Tools.

AAA of Missouri	CSI Leasing, Inc.	Jersey Community School District #100	Reinsurance Group of America, Inc. (RGA)
Afton Chemical Corporation	Curium	Jet Aviation	Rockwood School District
Allsup, Inc.	Cushman & Wakefield	KellyMitchell Group, Inc.	Ross & Baruzzini, Inc.
Alton Memorial Hospital	Daugherty Business Solutions	KPMG LLP	Roxana Community Unit School District #1

Alton School District #11	Dean Foods - Pet Dairy	Kraft Foods - Capri Sun	RubinBrown LLP
Alton Steel, Inc.	Delmar Gardens Enterprises	Krey Distributing Company	Saint Louis University
Ameren	Deloitte	Lee Enterprises, Inc.	Save-A-Lot
American Water Works Company, Inc.	Department of Veteran's Affairs	Lewis, Rice & Fingersh, L.C.	Schnuck Markets, Inc.
Amsted Rail	Diagraph an ITW Company	Lincoln County Medical Center	Shop 'n Save
Anderson Hospital	Dierbergs Markets, Corporate Office	Lincoln County R-III School District	Sigma-Aldrich Corporation
Anheuser-Busch	Dot Foods Inc.	Lindbergh Schools	SKF-Lincoln Industrial
Anthem Blue Cross and Blue Shield	Dr. Pepper Snapple Group **NOTE:** This will now appear as “**Keurig Dr. Pepper**” in the table.	Lindenwood University	So. Illinois Regional Wellness Ctr
ARCTURIS	DTZ	LMI Aerospace Inc.	Southwestern Illinois College
Argosy Casino Alton	DuPont	Lockton Inc.	Southwestern Illinois College - Sam Wolf Granite City Campus
Armstrong Teasdale LLP	East Alton School District #13	Macy's Central	Spire
Ascension Health Alliance	East Alton-Wood River School Dist. #14	Madison County Government	Spot Media Production
Associated Bank	East St. Louis School District 189 Administrative Office	Madison CUSD #12	SSM Health Care
AT&T Missouri	Eastman	Major Brands, Inc.	St. Anthony's Medical Center
Auffenberg Dealer Group of Illinois	Eaton's Bussmann Business	Mallinckrodt Pharmaceuticals	St. Elizabeth's Hospital
Bank of America	Edgewell Personal Care	Maritz Inc.	St. Louis Blues/Scottrade Center
Bank of Washington	Edward Jones	Mary R. Wolff Real Estate Management	St. Louis Business Journal
Belden Inc.	Edwardsville Community Unit School District #7	Maryville Technologies	St. Louis Cardinals
Belleville Boot Company	Emerson	MasterCard Operations & Technologies MasterCard Worldwide	St. Louis City Employee Campaign
Belleville Public School District #118	Emerson Hermetic Motor	McCarthy Building Companies, Inc.	St. Louis Community College
Benetech Investments Corp.	Emerson Process Management	McKelvey Homes, LLC.	St. Louis County Employee Campaign

Benjamin F. Edwards, Inc.	Energizer Holdings Inc.	MECS	St. Louis County Library
Bethalto School District #8	Enterprise Financial	Medical Transportation Management, Inc.	St. Louis Post-Dispatch
Bethesda Health Group, Inc.	Enterprise Holdings, Inc.	Mehlville School District	St. Louis Public Schools
BJC HealthCare	Equifax Workforce Solutions	Melton Machine	St. Luke's Hospital
BKD, LLP	Ernst & Young LLP	Memorial Hospital	Stifel
BMO Harris Bank	Express Scripts	Mercy Health	Stupp Bros., Inc.
Brown Smith Wallace, LLC	FedEx	MetLife	Target Corporation
Bryan Cave LLP	First Bank	Metro Medical Equipment and Supply	TD Ameritrade
BSI Constructors Inc.	First State Bank of St. Charles	Metropolitan St. Louis Sewer District	Telephone Contact, Inc.
Buckeye International, Inc.	FleishmanHillard	Midwest BankCentre	Terminal Railroad Association
Build-A-Bear Workshop	Francis Howell School District	Millstone Weber, Inc.	The Boeing Company
Bull Moose Tube Company	Gateway Regional Medical Center	Missouri State Employees	The DESCO Group
Burns & McDonnell Engineering Company	GCS Credit Union	Missouri-American Water Company	The Federal Reserve Bank of St. Louis
Caleres	GENCO	MiTek USA, Inc.	The Keeley Companies, Inc.
Casino Queen, Inc.	General Motors Truck Group Wentzville Assembly Center	Moneta Group	The Korte Company
Cass Information Systems, Inc.	GEODIS	Monsanto Company	The Laclede Group
Centene Corporation	GKN Aerospace Services - St. Louis	Murphy Company	The Millstone Company
Central Bank of St. Louis	Gonzalez Companies, LLC	National Information Solutions Cooperative (NISC)	The PNC Financial Services Group
CenturyLink Technology Solutions	Granite City Park District	Nature's Bakery	The ROHO Group
Challenge Manufacturing	Granite City School District #9	Nestle Purina PetCare Company	The St. Louis American Newspaper
Charter Communications	Graybar Electric Company, Inc.	NGA	TheBANK of Edwardsville
Citi	Greensfelder, Hemker & Gale, P.C.	Nidec Motor Corporation	Thompson Coburn LLP

City of Alton	Harbour Group Ltd.	Nordstrom Corporate Office	TKC Holdings
City of Belleville	Hastings & Chivetta/8760 Engineering	Northwestern Mutual - St. Louis	Tree House Foods
City of East St. Louis	Hazelwood School District R1	Novus International, Inc.	TricorBraun Inc.
City of Edwardsville	HBM Holdings	Olin Brass a subsidiary of Global Brass and Copper, Inc.	U.S. Bank
City of Granite City	Highland Community School District #5	Olin Corporation	UMB Bank of St. Louis, NA
City of O'Fallon, IL	HLK Agency	OSF Healthcare Systems	UniGroup, Inc.
City of O'Fallon, MO	HOK	Paric Corporation	Union Pacific Corporation
City of St. Charles	Holland Construction Services	Parkway School District	University of Missouri - St. Louis
City of St. Charles School District	Hubbell Power System, Inc.	Peabody Energy	UPS
City of St. Peters	Hunter Engineering Company	Pfizer	USDA
City of Wentzville	Husch Blackwell LLP	Phillips 66	USPS
CNB Bank & Trust	Hussmann Corporation	Plaza Motor Company	USS - Granite City Works
Coin Acceptors, Inc.	HWRT Oil Company LLC	Plumbers & Gasfitters Local 360	Wal-Mart Stores, Inc.
Collinsville School District #10	IBM Corporation	Polsinelli	Washington University in St. Louis
Commerce Bancshares, Inc.	ICL Performance Products LP	PricewaterhouseCoopers LLP	Webster University
ConAgra Foods	Ingersoll Rand	Procter & Gamble Manufacturing Company	Wells Fargo
Convergys Corporation	Intelligrated	Pulaski Bank	White Rodgers
Cope Plastics, Inc.	Jacobs Engineering	QuikTrip Corporation	World Wide Technology, Inc.
Corizon Health	Jersey Community Hospital	Regions Bank	

VII. Appendices

Definitions

Administrative and Other Ongoing Service Volunteers
Administrative and other ongoing service volunteers do not serve in a way that directly relates to program services on behalf of clients. These volunteers do not serve consistently on a Board or Board committee. Examples of administrative duties include (but are not limited to) transferring paper documentation to electronic records, stuffing mailers, picking up donations for fundraising events, and similar administrative tasks.

ACTS - Agency Consultation, Training and Support
Agency Consultation, Training and Support (ACTS) provides guidance, direction, and capacity building support to member agencies through trainings, direct consultation, and consultant and partner-led programs.

Child Care Match and Scholarships
The Match Fund started when early childhood care and education centers were required to identify "match" dollars in order to access state reimbursement funds for low income families who could not afford to pay the cost of care. United Way's member agencies decided to use allocable dollars from the Early Childhood Care and Education panel in order to establish this Match Fund.

Although the state no longer requires "match" dollars, the Match and Scholarship Fund is still a financial support for member agencies that provide early childhood care and education to city residents in an accredited center. The supplemental funding allows centers the ability to offer a sliding fee scale to families in need whether they receive state subsidy assistance or do not qualify for state subsidy but still cannot afford to pay the full cost of care.

CID - Community Investment Division
The Community Investment Division (CID) supported volunteers who invested funds raised in United Way's campaign in Missouri counties and Monroe, St. Clair and Clinton counties in Illinois (see United Way of Greater St. Louis Panel Structure appendix for a list of agencies and United Way staff contacts).

CFC - Combined Federal Campaign
The Gateway Combined Federal Campaign (CFC) is the workplace giving campaign for federal, military and postal employees throughout eastern Missouri and southern Illinois. The federal government's Office of Personnel Management determines the requirements and process; United Way is considered a federation of the CFC, which means that all member agencies can only apply to the CFC through the United Way. Earth Share manages the CFC in our region and decides which agencies are approved.

Cobranding
Member agencies are expected to actively cobrand with United Way. Requirements include: use the "Proud Member of United Way" logo on facilities, website, annual report, newsletters, e-newsletters, letterhead and brochures; provide trained agency representatives to speak on behalf of United Way during the campaign; and run a United Way campaign for agency employees.

Continuous Quality Improvement
Continuous Quality Improvement (CQI) is a concept that originated in the business industry and has been successfully applied in health and human services. It is an approach to quality assurance that emphasizes continually improving an organization's systems and processes to meet the needs of those served and improve the services offered. It involves a system of gathering, analyzing, and responding to collected data to guide efforts to meet an organization's vision, mission, and values. CQI also incorporates an ongoing process of identifying and implementing opportunities for improvement.

Direct Clients
These clients generally receive extensive and/or long-term services in small groups or one-on-one. Intake records or other reliable methods of collecting information on these clients are maintained.

- Direct Clients in UW Service Area – Clients who reside in the United Way 16 county service area
- Direct Clients Outside of UW Service Area – Clients who do not reside in the United Way 16 county service area

Episodic Volunteers
Episodic volunteers serve once or very few times for a particular event or purpose.

Field of Service Area
There are thirteen field of service areas listed in the "Outcomes" section of United Way reporting. Agencies must select the field of service area they believe best fits each of their programs. Programs may fall under multiple field of service area categories but agencies can only select one primary area. This information is particularly helpful in data analysis.

FTE - Full Time Equivalent
FTE is defined as the number of total hours worked by agency employees divided by the maximum number of compensable hours in a work year as defined by law. For example, if the work year is defined as 2,080 hours, then one employee occupying a paid full time job is equivalent to one FTE. Two employees working for 1,040 hours each are equivalent to one FTE.

Gap Analysis
The surplus or deficit that results after subtracting program expenses from program revenues – this amount indicates how much money the agency must raise to sustain the program.

- Expense/revenue information should include PROGRAM specific
  - Management and general expenses
  - Program operating expenses
  - United Way of Greater St. Louis funding used in the program
  - Revenue generated by program service fees
  - Grants that are restricted to the program

Indirect Clients
These clients generally receive one-time or infrequent services from the agency and the services may be provided in a group setting. Detailed records for each client are not maintained, although a basic count of the number of participants and demographic estimates should be available. Demographic information is typically difficult or impossible to collect. Thus, if you do not have demographic information, the client is likely an indirect client.

Measurement Tool/Method
Measurement tools/methods are used to assess effectiveness of programs and services. For the Outcomes section of United Way reporting, a measurement tool/method should be used to determine if a client has achieved the selected outcome. Providing context about the process that is used to determine if a client has achieved an outcome may be more helpful than only listing tools/assessments.

Ongoing Direct Service Volunteers
Ongoing direct service volunteers serve consistently during a portion of the year and in a way that directly relates to program services on behalf of clients.

Outcomes
An outcome is a change or benefit a client experiences during or after a program for which the agency believes it has helped contribute to; outcomes can be:

- Short-term - changes in client knowledge, attitudes, and/or skills
- Intermediate - changes in client behavior
- Long-term - meaningful changes in client condition and/or status

Portfolio Manager
United Way staff that serve as liaisons between allocations volunteers and member agencies. Portfolio Managers have field of service and nonprofit best practices expertise.

Pre-audit Financials
Agencies with a fiscal year that ends between July-December may not have audited financials from the previous year prepared by United Way's reporting deadline. These agencies may therefore submit pre-audit financials for the previous year. If available, however, audited financials should be submitted. All agencies, regardless of fiscal year, should submit a current year budget and audited financials from two years ago.

SWID - Southwest Illinois Division
The Southwest Illinois Area Division (SWID) supported volunteers who invested funds raised in United Way's campaign in Calhoun, Greene, Jersey, Macoupin and Madison Counties in Illinois (see United Way of Greater St. Louis Panel Structure appendix for a list of agencies and United Way staff contacts).

TCAD - Tri Cities Area Division
The Tri Cities Area Division (TCAD) supported volunteers who invested funds raised in United Way's campaign in Madison County, Illinois (see United Way of Greater St. Louis Panel Structure appendix for a list of agencies and United Way staff contacts).

United Way Allocations Panels
United Way uses panels to group agencies that serve in the same field of service area. The United Way of Greater St. Louis Panel Structure appendix shows agencies by panel and United Way staff contacts. Panels are led and comprised of allocations volunteers who serve as the eyes and ears of United Way donors. Traditionally, these volunteers visit member agencies and review materials to assess demonstration of United Way's Quality Standards, make funding decisions, and recommend areas of improvement.

United Way Allocations Volunteers
Traditionally, allocations volunteers serve as the eyes and ears of United Way donors by leading and comprising the United Way of Greater St. Louis panels (please see the United Way of Greater St. Louis Panel Structure appendix for agencies by panel and United Way staff contacts). In our previous investment model, volunteers visited member agencies and reviewed materials to assess demonstration of United Way's Quality Standards, make funding decisions, and recommend areas of improvement.

United Way Service Area

United Way of Greater St. Louis serves 16 counties in Illinois and Missouri with a population of nearly 3 million people.

Illinois Counties	Missouri Counties
Calhoun	Franklin
Clinton	Jefferson
Greene	Lincoln
Jersey	St. Charles
Macoupin	St. Louis city
Madison	St. Louis
Monroe	Warren
Randolph	
St. Clair	

Frequently Asked Questions (FAQ)

Note: These questions are hyperlinked in the electronic version of the Reporting Guide

TECHNICAL QUESTIONS (How to complete reporting – typically direct these questions to reporting@stl.unitedway.org)

1. What do I do if I can't log into reporting?
2. I accidentally hit SUBMIT instead of SAVE, how do I get back into my form?
3. Some of my forms are OUTSTANDING, is that ok?

CONTENT QUESTIONS (What to include in reported information – typically direct these questions to your Portfolio Manager/UWGSL staff contact)

4. What if I'm unsure about what information I should enter?
5. How should I structure my program tree?
6. Our agency has a parent/national organization, is that our accrediting body?
7. What clients do I include in the demographic sections?
8. Does it matter if my agency has mainly "unknown" client demographics?
9. What clients do I include in the program profile?
10. What should be included in the United Way of Greater St. Louis funding line?
11. What financial information should be included in the Program Profile (questions #11 and 12)?
12. Operating reserves % and support services % shows as outstanding – what does this mean?
13. How many outcomes should my agency include for each program?
14. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?
15. Can we use the same text for the Continuous Quality Improvement section for each program?

GENERAL/OTHER QUESTIONS

16. Who is my agency's Portfolio Manager or United Way staff contact?
17. What is my agency's Allocations Panel?
18. I don't like my program tree. Can this be changed?
19. What happened in the past with data submitted during reporting?
20. How is my agency's reported data going to be used this year?
21. What if I my agency doesn't complete reporting by the deadline?
22. What questions were removed from 2019 reporting?

TECHNICAL QUESTIONS

1. **What do I do if I can't log into reporting?**
   There are a few reasons you may not be able to log into the reporting portal, if you are not able to login for another reason please contact reporting@stl.unitedway.org for help:

Reason for Login Failure	Solution/Next Step
You forgot your password	Select "FORGOT USER ID OR PASSWORD" on the login page to reset your password
You can't find the login page	Refer to "Accessing Web-Based Reporting" on page 3 of this guide
You or your organization have not requested that you have access to the reporting portal	Email reporting@stl.unitedway.org to set up a login and password for the portal
You are locked out after failed password attempts	After 4 attempts to enter the portal users will be locked out, if this occurs email reporting@stl.unitedway.org to unlock the system

2. **I accidentally hit SUBMIT instead of SAVE, how do I get back into my form?**
   The SAVE button allows you to return to the entered data and make changes at a later time. Once SUBMIT has been clicked the form cannot be accessed and users will be locked out. If you submit your information prematurely and need to get back into a form, please email reporting@stl.unitedway.org Please note that users will not be able to access forms after the reporting deadline.

3. **Some of my forms are OUTSTANDING, is that ok?**
   Yes, every agency will have at least one OUTSTANDING financial form for 2018 financials (the pre-audit or audited form will be outstanding based on when your previous year audit is completed). If you have other forms showing as OUTSTANDING and believe your agency does not need to complete them, please contact your Portfolio Manager or United Way staff listed on the reporting portal homepage.

CONTENT QUESTIONS

4. **What if I'm unsure about what information I should enter?**
   Agency finance categories, outcomes, program descriptions, board information, client demographics, volunteer categories, and any other questions about the CONTENT of information submitted should be directed to your agency's United Way staff contact listed on the reporting portal homepage. You can also find your agency's staff contact in the United Way of Greater St. Louis Panel Structure appendix of this document.

5. **How should I structure my program tree?**
   Member agencies should include all programs in reporting since United Way funding is unrestricted and supports the entire agency. If your agency is uncertain about how to structure your program tree please contact your Portfolio Manager. Please note that it can be helpful to consider how your agency lists programs on the IRS 990 form.

6. **Our agency has a parent/national organization, is that our accrediting body?**
A parent/national organization is not an accrediting body. While a parent/national organization may conduct a review process of local affiliate agencies, United Way does not consider this as accreditation. Recognized accrediting bodies (e.g., CARF, COA, and the Joint Commission) outline and evaluate administrative standards with the aim of helping nonprofits achieve excellence in service and operation. Accreditation requirements often incorporate federal, state, local legislature and regulations, best practices in management and service delivery, and shared expectations among public and private funders.

7. **What clients do I include in the demographic sections?**
The client demographic section of United Way reporting has 7 sections and should include the following clients:

Demographics Section	Clients to Include
Total Clients Served	This will include all clients served in all programs, this section is segmented into: • Unduplicated, direct clients who reside in the 16 county United Way region (this can include direct clients with an unknown zip code) • Unduplicated, direct clients who reside outside of the 16 county United Way region • All indirect clients
Gender	Unduplicated, direct clients from all programs that reside in the 16 county United Way region (this can include direct clients with an unknown zip code)
Race/Ethnicity	Unduplicated, direct clients from all programs that reside in the 16 county United Way region (this can include direct clients with an unknown zip code)
Age	Unduplicated, direct clients from all programs that reside in the 16 county United Way region (this can include direct clients with an unknown zip code)
Annual Household Income	Unduplicated, direct clients from all programs that reside in the 16 county United Way region (this can include direct clients with an unknown zip code)
Zip Code	Unduplicated, direct clients from all programs that reside in the 16 county United Way region (this can include direct clients with an unknown zip code)

8. **Does it matter if my agency has mainly "unknown" client demographics?**
As defined in the Program Quality Standards, agencies ensure that their program is serving the intended target population (which agencies define in the "Program Description") by measuring direct client demographics. When a large portion of client demographics are unknown it may raise questions about what organizational systems and processes are in place to ensure program outcomes and impacts are achieved within the defined target population. With certain programs it is understandable that particular demographics are unknown (such as zip codes of homeless clients); agencies with high percentages of "unknown" direct client demographics should be prepared to explain why this is appropriate for their services and can consult with their Portfolio Manager as needed.

9. **What clients do I include in the program profile?**
   The program profile is completed for each agency program and should include all direct and indirect clients that received services under that program. This number should represent unduplicated clients, even if they received multiple services under the same program. Please refer to the definitions page for an understanding of direct and indirect clients.

10. **What should be included in the United Way of Greater St. Louis funding line?**
    United Way of Greater St. Louis income may comprise all funding received including, but not limited to:
    - Community Investment Division Allocation
    - Combined Federal Campaign (CFC)
    - Southwest Illinois Division (SWID) Allocation
    - Tri-Cities Area Division (TCAD) Allocation
    - Agency Consultation, Training and Support (ACTS) Capacity-Building Grant
    - Child Care Match & Scholarship
    - One-Time Grants
    - Donor Designations
    - IDA Match Funds

    Please note that there are two lines for United Way funding. Money from the United Way of Greater St. Louis should be reported under the "United Way of Greater St. Louis" and any funds received from other area United Ways should be reported under "Other United Ways".

11. **What financial information should be in the Program Profile (questions 11 and 12)?**
    Agencies should enter expense/revenue information for each program (also known as the gap analysis) that reflects:
    - Expenses to operate the program, including management and general expenses
    - Revenue associated with the program
      - United Way of Greater St. Louis funding used in the program
      - Any revenue generated by program service fees
      - Grants that are restricted to this program

    Note that our system will generate a resultant surplus or deficit that indicates how much money the agency must raise to sustain the program.

12. **Operating reserves % and support services % show as outstanding – what does this mean?**
    If these items are outstanding it indicates that an agency's audit analysis is pending internally at United Way. Once our finance team has completed the audit analysis, the figures will automatically populate. Please follow up with your agency's Portfolio Manager for additional questions regarding this outstanding data.

13. **How many outcomes should my agency include for each program?**
    Agencies must report at least one outcome for each program and can report up to five outcomes. Agencies are encouraged to report all meaningful outcomes for their program. Agencies should contact their Portfolio Manager or United Way staff contact if they are unsure of which outcomes are meaningful.

14. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?

When describing/listing the measurement tool/method in the "Outcomes" section, it is best to be very clear and specific about how the agency understands if a client has actually achieved the selected outcome. If more than one measurement tool or method is used, describe how those various tools are used to determine achievement. It may be helpful to outline what score or level of completion on an assessment dictates achievement of an outcome. If one answer on a survey/assessment is used to determine achievement of a particular outcome, it may be helpful to list that question in the measurement tool/method section rather than the survey name.

15. Can we use the same text for the Continuous Quality Improvement section of each program?

Rather than give a general description of the overall continuous quality improvement (CQI) efforts, agencies are encouraged to specifically describe how CQI is used to better outcomes and processes of each program. Agencies can also include specific examples of program improvements that have been identified and implemented through their CQI process.

GENERAL QUESTIONS

16. Who is my agency's Portfolio Manager or United Way staff contact?

Portfolio Managers and United Way staff contacts are listed on the online portal homepage. You can also find the appropriate staff contact in the United Way of Greater St. Louis Panel Structure appendix of this guide.

17. What is my agency's Allocations Panel?

You can find a list of Allocations Panels and the funded agencies that are part of that Panel in the United Way of Greater St. Louis Panel Structure appendix of this guide.

18. I don't like my program tree. Can this be changed?

Agencies can view their program tree structure under the "Agency and Program Descriptions" tab of the main menu in the online reporting portal. All program tree changes for 2019 reporting were due to Portfolio Managers by February 15, 2019.

19. What happened in the past with data submitted during reporting?

Data submitted by member agencies helps United Way understand services provided and impact achieved by funded entities. In the past, this information was used to generate reports and materials that United Way allocations volunteers used to assess how well agencies demonstrate Quality Standards. Data collected during reporting is also used to identify priority areas for supplemental funding, understand regional resources for specific populations, assess community need, identify best practices and effective models for service, pursue grant funding, and more.

20. How is my agency's reported data going to be used this year?

Completing annual reporting is a key part of fulfilling the United Way Member Agency Agreement (shown in the Administrative Profile). Data collected during reporting will be used to help United Way understand services provided, clients served, impact achieved, use of funding, demonstration of Quality Standards, cobranding efforts, and compliance with federal mandates by funded agencies. As our investment model transitions, staff and/or volunteers will continue to use reports generated from submitted data to understand demonstration of Quality Standards by member agencies. Reporting also highlights emerging social service trends and prevalent needs in health and human services. Reporting from funded agencies helps United Way in its efforts to invest in quality agencies that are working to address community needs and help people in the St. Louis region live their best possible lives.

21. What if I my agency doesn’t complete reporting by the deadline?

As part of the Member Agency Agreement, agencies are required to submit all reporting information by the stated deadline. After this deadline, United Way completes a data integrity audit to ensure that agencies have submitted all required forms and to check for any possible erroneous data entries. Agencies that fail to submit forms are out of compliance with the Member Agency Agreement and therefore at risk of having their United Way allocation withheld. These agencies may also receive an observation in their panel recommendations noting that reporting was incomplete at the time of submission.

United Way staff will contact agencies that have potentially entered erroneous data to make corrections as needed.

22. What questions were removed from 2019 reporting?

The MAP Progress Report was removed from 2019 reporting.

United Way of Greater St. Louis Panel Structure

Basic Needs & Economic Opportunity (25)	**Child Welfare** (19)	**Disabilities Services** (21)
Darlene Martin	Mike Abrams	Mary Pryse
Catholic Charities of Madison County	Almost Home, Inc.	Center for Hearing & Speech
Catholic Charities of St. Louis	Annie Malone Children and Family Service Center	Central Institute for the Deaf
Center for Women in Transition	Caritas Family Solutions	Community Link
Collinsville Area Meals On Wheels	CASA of Southwestern Illinois	Community Living, Inc.
Community Care Center, Inc.	Child Center Marygrove	Delta Gamma Center for Children with Visual Impairments
Crisis Food Center, Inc.	Children's Home and Aid	Duo Dogs, Inc.
Employment Connection	Epworth Children and Family Services, Inc.	Easter Seals Midwest
Empower Missouri	FamilyForward	Emmaus Homes, Inc.
Fathers' Support Center, St. Louis	Foster and Adoptive Care Coalition	Human Support Services
Good Samaritan House of Granite City, Inc.	Good Shepherd Children and Family Services	Illinois Center for Autism
Highland Area Christian Service Ministry	Great Circle	IMPACT Center for Independent Living (CIL)
Humanitri	Lutheran Child and Family Services of Illinois	LifeBridge Partnership
International Institute of Metropolitan St. Louis	Lutheran Family and Children's Services of Missouri	Macoupin Center for the Developmentally Disabled
Madison County Urban League, Inc.	Nurses for Newborns	MindsEye Radio
MERS/Missouri Goodwill Industries	Saint Louis Crisis Nursery	NextStep for Life, Inc.
Operation Blessing 'People That Care" Inc.	St. Clair County Child Advocacy Center	Paraquad, Inc.
Rebuilding Together SouthWest Illinois	St. Vincent Home for Children	St. Clair Associated Vocational Enterprises, Inc.
Riverbend Family Ministries, NFP	Voices for Children	St. Joseph Institute for the Deaf
Society of St Vincent De Paul of St. Louis	Youth In Need	St. Louis Arc
Society of St. Vincent De Paul, Edwardsville		Tri-Cities Area Association for Handicapped, Inc.
St. Louis Area Foodbank, Inc.		United Cerebral Palsy Heartland
St. Patrick Center		
The Salvation Army		
Urban League of Metropolitan St. Louis		
YWCA of Metropolitan St. Louis		
***Portfolio Manager is Darlene Martin ** Portfolio Manager is Ed Hennessey**		

United Way of Greater St. Louis Panel Structure

Domestic Violence & Legal Services (9)	**Early Childhood Care & Education** (12)	**Health Services** (18)	**Mental Health & Substance Abuse** (15)
Darlene Martin	Mike Abrams	Mary Pryse	Mary Pryse
Call for Help, Inc.	Cornerstone Center for Early Learning, Inc.	Alzheimer's Disease and Related Disorders Association, St. Louis Chapter**	Alcoholic Rehabilitation Community Home
Crime Victim Advocacy Center of St. Louis	Kreative Kids Learning Center	American Cancer Society**	Compass Health Network
Land of Lincoln Legal Assistance Foundation, Inc.	Lemay Child and Family Center	American Diabetes Association	Comtrea, Inc.
Legal Services of Eastern Missouri, Inc.	Queen of Peace Center	American Heart Association - Greater St. Louis Chapter**	Harris House Foundation
Oasis Women's Center	Riverbend Head Start and Family Services, Inc.	American Lung Association of the Upper Midwest, Inc.**	Jewish Family and Children's Service
St. Martha's Hall	SouthSide Early Childhood Center	American Red Cross of Central and Southern Illinois Region	Kids In The Middle, Inc.
Turning Point Advocacy Services	St. Martin's Child Center	American Red Cross of Eastern Missouri	Mental Health America of Eastern Missouri
Violence Prevention Center of Southwestern Illinois	St. Mary's Special Services for Exceptional Children	Amyotrophic Lateral Sclerosis Association St. Louis Regional Chapter	NAMI St. Louis
Women's Safe House	United 4 Children	Arthritis Foundation, Heartland Region, Inc.	National Council on Alcoholism and Drug Abuse - St. Louis Area, Inc.
	United Services for Children	Asthma and Allergy Foundation of America St. Louis Chapter	Preferred Family Healthcare
	University City Children's Center	Epilepsy Foundation of Missouri and Kansas	Provident, Inc.
	Webster Child Care Center at Laclede Groves	Infant Loss Resources	Safe Connections
		JDRF/Greater Missouri and Southern Illinois	Saint Louis Counseling, Inc.
		Lupus Foundation of America Heartland Chapter Inc.	St. John's Community Care
		National Kidney Foundation Inc.	The National Alliance on Mental Illness Southwestern Illinois
		National Multiple Sclerosis Society - Gateway Area Chapter	
		Saint Louis Effort for AIDS, Inc.	
		Visiting Nurse Association Greater St. Louis	

Portfolio Manager is Darlene Martin** * Portfolio Manager is Ed Hennessey**

United Way of Greater St. Louis Panel Structure

Neighborhood Organizations (10)	**Senior Services** (10)	**Youth Development** (23)
Darlene Martin	Darlene Martin	Mike Abrams
Community Council of St. Charles County	Calhoun County Council for Senior Citizens	Big Brothers Big Sisters of Eastern Missouri
Grace Hill Settlement House	Cardinal Ritter Senior Services	Big Brothers Big Sisters of Southwestern Illinois
Guardian Angel Settlement Association	Faith in Action Edwardsville / Glen Carbon	Boy Scouts of America - Abraham Lincoln Council**
Jewish Federation of St. Louis	Lincoln County Council on Aging	Boy Scouts of America, Inc., Greater St. Louis Area Council**
Kingdom House	Lutheran Senior Services	Boys and Girls Club of Alton, Inc.
Lessie Bates Davis Neighborhood House, Inc.	Main Street Community Center, Inc.	Boys and Girls Club of Bethalto, Inc.
Northside Youth And Senior Service Center, Inc.	Mary Ryder Home	Boys and Girls Clubs of Greater St. Louis, Inc.
Unleashing Potential	Senior Services Plus, Inc.	Boys and Girls Clubs of St. Charles County
Wesley House Association	VOYCE	College Bound
Youth and Family Center		Coordinated Youth and Human Services
		Gateway Region YMCA
		Gene Slay's Boys' Club of St. Louis, Inc.
		Girl Scouts of Central Illinois
		Girl Scouts of Eastern Missouri
		Girl Scouts of Southern Illinois
		Girls Incorporated of St. Louis
		Jewish Community Center
		Joe W. Roberts Youth Club
		Leu Civic Center, Inc.*
		Mathews-Dickey Boys and Girls Club
		Scott Air Force Base Youth Programs
		Sherwood Forest Camp, Inc.
		Wyman Center, Inc.
		Young Men's Christian Association of Edwardsville
***Portfolio Manager is Darlene Martin**		**** Portfolio Manager is Ed Hennessey**