

2022 ANNUAL REPORTING AND 2023 RENEWAL APPLICATION GUIDE

UNITED WAY OF GREATER ST. LOUIS

DEADLINE: Friday, April 29th @ 5:00 PM

Helping people.



Greater St. Louis

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I. Renewal Application Process

United Way of Greater St. Louis annually collects data and information from its funded partners for the following purposes: accountability to donors and the community, informing community investments, fundraising, evaluation, research, benchmarking, and knowledge sharing. This abbreviated version of annual reporting is designed to capture information that demonstrates the services and impact provided through the member agency network in 2021.

PLEASE NOTE: The 2022 Annual Reporting and 2023 Renewal Application will be open from March 7, 2022, through April 29, 2022, with responses due by 5:00pm on April 29th, 2022.

United Way of Greater St. Louis has transitioned to using Form Assembly to collect agency data this year as it allows us more control over the forms while providing a much better user experience for you. However, Form Assembly does not have users and logins in the traditional sense. That is why we are recommending **one person in the organization be designated to enter the information into the forms and to submit the forms.**

We also recommend **writing all responses to the questions outside Form Assembly** in traditional word processing software like Microsoft Word. You will have the ability to print and review your responses before submitting. The list of questions and instructions for printing before you submit are provided later in this guide.

The link to the Renewal Application is below:

[2022 Annual Reporting and 2023 Renewal Application](#)

Please direct questions regarding the technical aspects of Form Assembly, saving, resuming, and entering information into 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 Contact List in the Appendices for a list of agencies and corresponding United Way staff contacts.

Portfolio Manager/Staff Member	Panels	Email Address
Anna Paul	Crisis Intervention Food Security Housing Security	Anna.paul@stl.unitedway.org
Darlene Martin	Aging & Senior Support Community Building Jobs Services for Individuals with Disabilities	Darlene.martin@stl.unitedway.org
Dawna Gilbreath	Child Welfare Early Childhood Education	Dawna.gilbreath@stl.unitedway.org

	K-12 Education & Out of School Time	
Julia Fuller	Access to Healthcare Behavioral Health & Substance Abuse Physical Health Services for Individuals with Disabilities	julia.fuller@stl.unitedway.org

II. Important Tips

1. System Requirements

To use the web-based reporting system, you will need the most up-to-date version of either Microsoft Edge, Google Chrome, or Mozilla Firefox.

2. Copying and Pasting into FormAssembly Forms

We are recommending **writing all responses to the questions outside FormAssembly and copying and pasting your responses into the correct text box. FormAssembly does not save your work as you are working,** so it is best to have another place where responses are saved outside of FormAssembly. You can copy and paste from any word processing software including Microsoft Word, Open Office, and Microsoft Excel without worrying about special characters (!, @, \$, etc.) or formatting changing.

3. Time Period for Reporting

Unless otherwise specified, the time-period for all questions is **January 1st, 2021-December 31st, 2021.**

4. Do not use Back or Reload Buttons on Browser

Each of the forms are self-contained. Therefore, using the Back and Reload buttons on your browser will not be necessary. If you mistakenly use the Back or Reload buttons, previously completed work may be lost. If you need to navigate to an earlier section of the form, you can use the numbers on the top of the page to navigate to a different page. If you need to leave your computer, save and resume later by using the links at the top and bottom of the form. Detailed instructions are provided later in the guide.

5. Spellcheck

The system does not contain an embedded spell check/grammar check; however, some web browsers do include this feature. We recommend typing narrative responses in a word processing system and then copying/pasting into the reporting system to minimize the likelihood of spelling and grammar errors.

6. Spell out Acronyms

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

III. Accessing the Reporting and Renewal Application

The Renewal Application can be accessed at the link below:

[2022 Annual Reporting and 2023 Renewal Application](#)

IV. Navigating and Using Forms

Navigating within the form is just like navigating any other website.

The screenshot shows the top of a web application. On the left is the United Way Greater St. Louis logo. On the right, there are links for 'APPLICATION GUIDE' and 'WEBINAR'. The main heading is '2022 Safety Net Renewal Application'. Below this is a progress indicator showing 'Page: 1 2 3 4 5', with '1' highlighted. There are two checkboxes: 'Save my progress and resume later' and 'Resume a previously saved application'. The form content includes the title 'Introduction Page', a label 'Introduction Paragraph', and two input fields: 'Agency Name *' and 'EIN *'. Below the EIN field is the instruction 'Please format as follows: 12-345678'. At the bottom of the form is a 'Next Page' button. A callout box on the right side of the page contains the text: 'Use the scroll bar on your browser to move through the form.'

ewal Application

Click this checkbox to save and resume your form.

Use these links to access reporting resources.

Page: 1 2 3 4 5 6 7

Save my progress and resume later | [Resume a previously saved form](#)

ewal Application

Navigate directly to a page by clicking the page number on this navigation bar.

Page: 1 2 3 4 5 6 7

Save my progress and resume later | [Resume a previously saved form](#)

How many episodic volunteers, who came once or very few times for a particular event or purpose, did your agency have in 2020?

*

Number can be estimated.

How many ongoing volunteers did your agency have in 2020? *

This can include direct services and/or administrative volunteers.

How many board and committee volunteers did your agency have in 2020? *

Previous Page

Next Page

Navigate to the next page by clicking the Next Page button at the bottom of each page.

[Save my progress and resume later](#) | [Resume a previously saved form](#)

Return to the previous page by clicking the Previous Page button.

Thank you paragraph.

Acknowledgement Statement

Yes

No

Signature/Initials for Acknowledgement *

Date *

The submit button is at the bottom of page 7 of the form.

Previous Page

Submit

[Save my progress](#)

Please limit answer to 500 words or less.

Please upload your agency's organization chart: *

[Choose File](#) No file chosen

Document should not exceed one page. File size should not exceed 35MB.

[Previous Page](#) [Next Page](#)

[Save my progress and resume later](#) | [Resume a previously saved form](#)

You can also save and resume your work by clicking this link at the bottom of each page.

The screenshot shows a form interface. At the top, there is a text input field with a placeholder text "Please limit answer to 500 words or less." Below this, there is a section for uploading an organization chart, with a "Choose File" button and the text "No file chosen". A note below states "Document should not exceed one page. File size should not exceed 35MB." At the bottom of the form, there are two orange buttons: "Previous Page" and "Next Page". Below the buttons, there are two blue links: "Save my progress and resume later" and "Resume a previously saved form". A callout box with a black border and a pointer to the "Save my progress and resume later" link contains the text: "You can also save and resume your work by clicking this link at the bottom of each page."

V. Saving and Resuming Forms

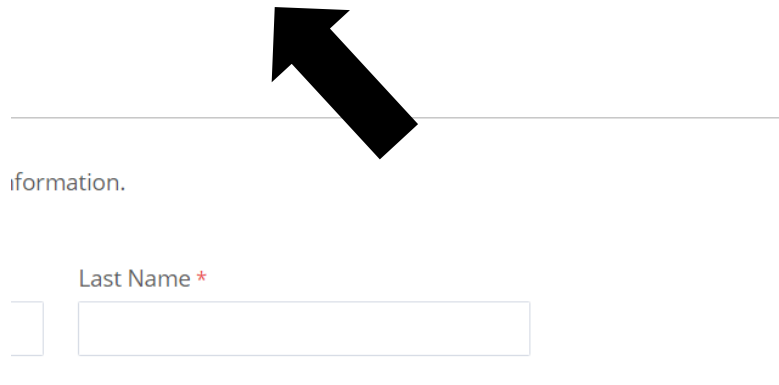
You will be able to save and resume your work if you need to get up from your working area. ****Note: Your work will not be saved on an ongoing basis. We recommend completing the responses in a word processing software and copying and pasting them into the form.**** Follow the directions below to save and resume your form.

1. You will be prompted to enter your email address and a password. Once you have entered them click the "Save" button.

Final Application

Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

Save my progress and resume later | [Resume a previously saved form](#)



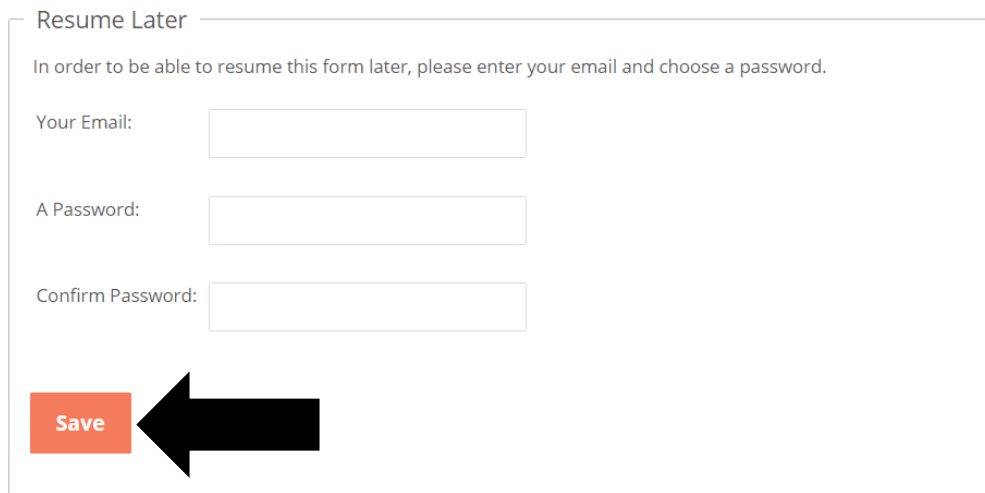
Information.

Last Name *

2. You will be prompted to enter your email address and a password. Once you have entered them click the "Save" button.

Page: [1](#) [2](#) [3](#) [4](#)

Save my progress and resume later | [Resume a previously](#)



Resume Later

In order to be able to resume this form later, please enter your email and choose a password.

Your Email:

A Password:

Confirm Password:

3. After clicking save, you will be taken to a webpage with a link to resume your form later. You will also receive an email with a link to resume your form later.

Thank you. Your response has been saved.

Do not use your browser's back button. If you need to return to the form, please use one of the links provided below.

- [Resume this form now](#)
- [Start a new form](#)



Bookmark this page for easy access when you need it.

You can resume this form at any time. **Make sure you can remember the email and password provided.** You will need them to resume your form.

You may bookmark this page for your convenience.

Thank you. Your response to "2022 Annual Reporting and 2023 Renewal"



Form Notification <no-reply@formassembly.com>
To Kurt Pelechek

If you don't receive this email right away, check your Spam folder.

You can resume this form at any time by going to <https://uwgsl.tfaforms.net/forms/resume/4603131>.



4. When you are ready to continue working on the form, click one of the links above. Enter your email and password and click "Resume this form." ****Note: If you forget your password, email reporting@stl.unitedway.org and a staff member will assist you in recovering it.****

Identity check

Please enter your email and password to resume this form.

Your Email:

Your Password:

Along with emailing reporting@stl.unitedway.org, you can click the "Forgot your password?" link to receive assistance on resetting your password.

[Resume this form](#)

[Forgot your password?](#) | [Need assistance with this form?](#)



VI. Printing Forms

Follow the directions below to review and print your forms before submission.

1. Scroll to the bottom of page 7 and click the "Submit" button.

Acknowledgement Statement

Yes

No

Signature/Initials for Acknowledgement *

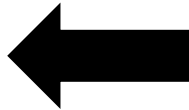
MA

Date *

Date

Previous Page

Submit



2. You will be taken to a page where you can review the answers you entered into the text boxes. To print your form, scroll to the bottom of the page and click "Print this page" and follow the prompts.

Yes

Signature/Initials for Acknowledgement

MA


Date


Date

Attached File:

IMG-1561.jpg (2.87 MB)

Confirm

 Make a correction

 Print this page



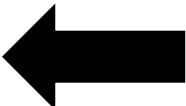
VII. Submitting Forms

Follow the directions below to submit your form once you've completed all required answers.

1. Scroll to the bottom of page 7 and click the "Submit" button.

Signature/Initials for Acknowledgement *

Date *

[Previous Page](#) [Submit](#) 

[Save my progress](#)

2. You will be taken to a page where you can review the answers you entered into the text boxes. Once you are satisfied with your responses, you can press the "Confirm" button to send the form in.

Yes

Signature/Initials for Acknowledgement

MA

Date

Date

Attached File:

IMG-1561.jpg (2.87 MB)



[Confirm](#)



[Make a correction](#)



[Print this page](#)

If you find a mistake or would like to make change, click the "Make a correction" to go back to editing your form.

VIII. List of Questions

The next sections of the guide provide a detailed look at everything United Way will be asking your agency about in the Renewal Application.

****Note: Many questions in the renewal application are conditional based on the responses to the questions above it. As a result, some of the questions listed here may not appear for you while filling out the form.****

A. Administrative Profile

1. Eligibility Documents

Were there been any updates to the following documents or policies in 2021? If yes, please upload the updated document(s).

- Federal 501(c)(3) Tax Determination Letter
- Illinois or Missouri Certificate of Corporate Good Standing
- Agency policy for background checks on staff and/or volunteers (and if applicable, policies on child abuse and neglect screenings)
- Agency policy on non-discrimination in hiring and service delivery
- Agency policy on privacy protection practices

Do you agree to the following anti-terrorism certification in compliance with the USA Patriot Act?:

In compliance with the USA Patriot Act and other counterterrorism laws and United Way World wide'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.

2. Briefly describe the work of your agency in 25 words or less. (25 Word Limit)

3. Please provide your organizational leader's most up to date contact information.

4. Name and contact information for the agency staff member who oversees the following (if applicable):

- Policy and/or advocacy work
- Volunteers
- United Way Employee Campaign Coordinator
- United Way Campaign Champion

B. Administration

5. Is your agency accredited or subject to review by your national organization? If yes, please list the accrediting body(ies) and expiration date(s) and/or your dues formula to your national organization. (500 word limit)
6. Has your agency had any legal, ethical, safety, or regulatory issues from January 1st to December 31st 2021 that we should be aware of? If yes, please explain. (500 word limit)
7. Has your agency had any official complaints or grievances from January 1st-December 31st? If yes, how many, and please explain. (500 word limit)
8. Enter the total number of people who were employed at any time from January 1st to December 31st 2021
9. What is the approximate number of Full Time Equivalent (FTE) positions normally employed?
Note: 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.
10. What is the approximate number of Part Time positions normally employed?
11. Are the agency's staff members diverse (e.g., age, sex, race) and reflective of the community served? Please explain (500 word limit)
12. How many episodic volunteers, who came once or very few times for a particular event or purpose, did your agency have in from January 1st to December 31st?
13. How many ongoing volunteers does your agency have? (direct services and/or admin).
16. Over the past year, how has the agency cultivated and prioritized diversity, equity, and inclusion in the workplace (i.e. new policies and procedures, trainings, etc.?)
17. Capacity building initiatives-Please provide the name, start date, end date, and status of up to 3 capacity building initiatives your agency has participated in from January 1-December 31st 2021. Enter "Ongoing" as end date for any incomplete activities.

C. Governance

1. Please provide updated Board Leader Information.
2. Were there any significant changes in your Board composition or activities in 2021? If yes, please explain. (500 word limit)
3. Did your organization conduct board meetings from January 1st-December 31st 2021? If so, how many meetings were held?

4. How many board volunteers does your agency have now?
5. How many committee volunteers does your agency have now?
6. Are the agency's board members diverse (e.g. age, sex, race) and reflective of the community served? Please explain. (500 word limit)
7. Are the agency's committee members diverse (e.g. age, sex, race) and reflective of the community served? Please explain. (500 word limit)
8. Is your agency currently participating in the Olin Board Fellow program?
9. Strategic plan-plan start date, end date, and description of goals. (500 word limit)
10. Does your organization have a systematic strategic planning process in which it uses the plan to inform operations?

Upload organizational chart.

Diversity, Equity, and Inclusion Efforts

1. Please describe your board's strategic efforts in Diversity, Equity, and Inclusion across the following areas made in 2021.

2. What challenges and successes has your agency had in DEI? Please include whether any new policies been written

- Administration
- Governance
- Finance
- Program

3. Use this space to upload any documentation to share regarding your agency's DEI efforts.

4. Please attach your completed board excel template below.

D. 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? If yes, give details about tax delinquency and current status. (100 word limit)

2. Is the agency required to file an IRS Form 990 or 990EZ tax return? Please upload.

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?

b) If no, provide details regarding late IRS Form 990/990EZ tax return submission. (100 word limit)

Please upload your agency's most recent Federal Form 990.

4. Please list any significant changes in the agency's financial situation for the current fiscal year. (500 word limit)

5. How did the agency utilize its United Way dollars in 2021?

6. What percentage of the 2022 United Way allocation award has been utilized to date? Note explanation if needed. (250 word limit)

7. Please provide an update regarding the agency's most recent budget to actual results.

Please upload a copy of the agency's quarterly financials through the most recently completed quarter.

Please upload your agency's most recent Federal Form 990.

E. Program

Please explain any major changes to your agency's programs and services or general operations made due to factors related to Covid-19. How do these changes affect plans for the future? (1000 word limit)

How does your agency determine appropriate targets for the number of service delivery units in each program? (500 word limit)

How often does your agency re-evaluate targets for the number of service delivery units in each program?

Does your agency collect demographic data on all direct clients (gender, race/ethnicity, age, income, etc.)? If yes, what is the process for collecting this data (500 word limit)

Total number of direct clients that reside in UW service area served by your agency from January 1st 2021-December 31st 2021.

Describe a service or good provided by your agency that the following monetary amounts would provide: \$10, \$50, \$150, \$500, \$100 (For example, \$10 will provide flu shots for 7 infants.)

Agency-Wide Clients Served to Date

Guidance Regarding Direct and 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. Please note that if a client receives a core direct service provided by your agency, even if only once, and you have any demographic information, the client should likely be considered direct, but records should be maintained to the degree that the same client is not counted twice in the direct client total.

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 should be available. Demographic information is typically difficult or impossible to collect for indirect clients.

Total Direct Clients that reside in [United Way Service Area](#) served by your agency from January 1 to December 31st, 2021. This number should be agency wide without duplication of clients.

Total Indirect Clients served by your agency January 1 to December 31st, 2021

Client Demographics

Gender Identity-Please enter the number of clients served who identify as the following categories:

- Female
- Male
- Self Defined/Other
- Decline to Disclose
- Unknown

The sum of the numbers you enter will display in the box marked "total clients served." This number should match "Total Direct Clients" above.

Ethnicity and Race Self Identification- Please enter the number of clients served who identify as the following categories:

- Asian
- Bi-Racial/Multi-Racial
- Black/African American
- Hispanic/Latino/Latinx
- Native American/Alaska Native
- Native Hawaiian/Other Pacific Islander
- White/Caucasian
- Decline to Disclose
- Unknown

The sum of the numbers you enter will display in the box marked "total clients served." This number should match "Total Direct Clients" above.

Household Income-Please enter the number of clients served who identify as the following categories:

- \$0-\$9,999
- \$10,000-\$14,999
- \$15,000-\$19,999
- \$20,000-\$29,999
- \$30,000-\$49,999

- \$50,000-\$59,999
- \$60,000-\$100,000
- More than \$100,000
- Decline to Disclose
- Unknown

Age-Please enter the number of clients served in the following categories.

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

The sum of the numbers you enter will display in the box marked "total clients served." This number should match "Total Direct Clients" above.

Zip codes-Please enter the number of clients you serve that reside in each zip code listed.

62001	62002	62003	62006	62009	62010	62012	62013	62014	62016
62018	62021	62022	62023	62024	62025	62026	62027	62028	62030
62031	62033	62034	62035	62036	62037	62040	62044	62045	62046
62047	62048	62050	62052	62053	62054	62058	62059	62060	62061
62062	62063	62065	62067	62069	62070	62071	62074	62078	62079
62081	62082	62084	62085	62087	62088	62090	62092	62093	62095
62097	62098	62201	62202	62203	62204	62205	62206	62207	62208
62215	62216	62217	62218	62219	62220	62221	62222	62223	62225
62226	62230	62231	62232	62233	62234	62236	62237	62238	62239
62240	62241	62242	62243	62244	62245	62248	62249	62250	62252
62253	62254	62255	62256	62257	62258	62259	62260	62261	62264
62265	62266	62269	62271	62272	62277	62278	62279	62280	62281
62282	62283	62285	62286	62288	62289	62292	62293	62294	62295
62297	62298	62355	62361	62366	62511	62626	62630	62640	62649
62667	62672	62674	62683	62685	62690	62694	62801	62916	63001
63005	63006	63010	63011	63012	63013	63014	63015	63016	63017
63019	63020	63021	63022	63023	63024	63025	63026	63028	63030

63031	63032	63033	63034	63037	63038	63039	63040	63041	63042
63043	63044	63045	63047	63048	63049	63050	63051	63052	63053
63055	63056	63060	63061	63065	63066	63068	63069	63070	63071
63072	63073	63074	63077	63079	63080	63084	63087	63088	63089
63090	63091	63099	63101	63102	63103	63104	63105	63106	63107
63108	63109	63110	63111	63112	63113	63114	63115	63116	63117
63118	63119	63120	63121	63122	63123	63124	63125	63126	63127
63128	63129	63130	63131	63132	63133	63134	63135	63136	63137
63138	63139	63140	63141	63143	63144	63145	63146	63147	63150
63151	63155	63156	63157	63158	63160	63163	63164	63166	63167
63169	63171	63177	63178	63179	63180	63182	63188	63190	63195
63197	63198	63199	63301	63302	63303	63304	63332	63333	63334
63338	63341	63342	63343	63344	63346	63347	63348	63349	63351
63357	63362	63363	63365	63366	63367	63368	63369	63370	63373
63376	63377	63378	63379	63381	63383	63385	63386	63387	63389
63390	63627	65041	65441						

The sum of the numbers you enter will display in the box marked “total clients served.” This number should match “Total Direct Clients” above.

Service Unit Costs

Describe a service or good provided by your agency that following monetary amounts would provide, including how many or how much would be provided.

(E.g. \$10 will provide flu shots for 7 infants; \$500 will provide a month of counseling sessions to a survivor of domestic violence; \$1000 will provide a three-month job training program for a veteran)

- \$10
- \$50
- \$150
- \$500
- \$1,000

The following questions will be asked for each program included in your agency's Safety Net contract:

- Program Name
- What percentage of your agency's 2021 United Way Allocation is dedicated to this program?
- Total number of direct clients that reside in UW service area served by this program from January 1st – December 31st 2021.
- Total number of indirect clients served by this program from January 1st

- - December 31st 2021.

Program Outcome

- Outcome Measured. Choose from list of 99 predefined outcomes. [Click here to access list.](#)
- Specific Target Population measured. For example, "Clients who completed 9 program sessions."
- Measurement Tool/Method. For example, "Clients completed the SUCCESS inventory survey at the beginning of the program and after 1 year. Clients whose scores improved by 5 or more achieved this outcome."
- Frequency of Measurement
- Number of Clients Measured-enter zero if reporting on community level outcome.
- Number of Clients who Achieved the Outcome. This number cannot be greater than the number of clients measured.
- Did you have a target goal for the percentage of clients to achieve this outcome? If yes, please enter goal in text box.

You can add additional outcomes by clicking the "Add another outcome" link after the Program Outcome section of the page. The button is at the lower right corner of the section.

C. Number of Clients Measured *

May enter 0 if reporting on a Community Level Outcome (#'s 67, 69, 79, 81, 85, 88, 91, 93, 95, 96, & 97)

D. Number of Clients who Achieved the Outcome *

This cannot be greater than the number of clients measured.

E. Did you have a target or goal for the percentage of clients to achieve this outcome?

Yes No

[Add another outcome](#)

- Describe your agency's CQI process for this program.
- 1) How are outcomes used? What adjustments have been made as a result of findings?
- 2) What successes and challenges have you had with this program and how have you responded?

Employment Services Information-Does this program provide employment support services to help clients get jobs? If yes, answer the following questions:

- How many clients received employment support services in 2021?
- Which of the following types of employment services were offered in this program?
 - Job Readiness (soft skills: e.g., life skills, employment basics, GED classes, resume writing, interview skills, conducting job searches, etc.). If yes, how many clients received service?
 - Job Training (hard skills: e.g., Microsoft Office, custodial services training, health care services training, etc.). If yes, how many clients received service?
 - Job Development/Placement (matching clients with jobs). If yes, how many clients received services?
 - Job Retention/Employment Support (client follow up). If yes, how many clients received service?

You can add additional programs by clicking the “Add another program” link after the Individual Program Information section of the page. The button is at the lower right corner of the section.

Individual Program Information

Program Name *

Total Direct Clients served by this program in 2020 that reside in United Way Service Area *

What measurement tools and/or methods does your agency use to determine if clients are achieving the contracted outcomes for this program? Please include frequency of measurement. *

Describe your agency's CQI process for this program. How are outcomes used? What adjustments have been made as a result of findings? What successes and challenges have you had with this program? *

Please limit responses to less than 1000 words.

[Add another program](#)

F. Renewal Questions

Would your agency like to be considered for 2023 funding? If no, why does your agency no longer wish to be considered for funding (500 word limit)? If yes, answer the following questions:

- What is your agency's projected total program expenses for fiscal year 2022?
- Does the agency foresee any projected changes in how it plans to utilize its United Way allocation award in 2023? (500 word limit)

- Does your agency anticipate any significant changes in your program for fiscal year 2022? If yes, please explain (500 word limit).
- Does your agency anticipate any significant changes in your governance structure for fiscal year 2022? If yes, please explain (500 word limit).
- Does your agency anticipate any significant changes in your finances for fiscal year 2022? If yes, please explain (500 word limit).
- Does your agency anticipate any significant changes in your administration structure for fiscal year 2022? If yes, please explain (500 word limit).

G. Acknowledgement

Please include the information of the primary person completing this form who should be our main contact for any questions about what is reported.

Acknowledgement Paragraph

Do you agree to the above statement? Please enter your initials.

IX. Appendices

A. 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. Where do I log in to reporting?
2. I accidentally submitted my form before I was done. What should I do?
3. I hit BACK, RELOAD, or closed my browser. Can I recover the information I entered?
4. The form I open does not look like the pictures you have in the guide. Did I do something wrong?

CONTENT QUESTIONS (What to include in reporting information – typically direct these questions to your Portfolio Manager/UWGSL Staff Contact)

5. What if I am unsure about what information I should enter?
6. What clients do I include in the demographic sections?
7. What clients do I include in the program form?
8. How many outcomes should my agency include for each program?
9. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?

GENERAL/OTHER QUESTIONS

10. Who is my agency's Portfolio Manager or United Way staff contact?
11. What happened in the past with data submitted during reporting?
12. How is my agency's reported data going to be used this year?
13. What if I my agency does not complete reporting by the deadline?

TECHNICAL QUESTIONS

1. Where do I log in to reporting?

There is no log in page for reporting this year. To access reporting, refer to the section titled "Accessing Reporting" above in this guide.

If you saved your form to resume it later and have lost the link or forgotten your password, please reach out to reporting@stl.unitedway.org.

2. I accidentally submitted my form before I was done. What should I do?

Hitting the "Submit" button on the bottom of the form one time **DOES NOT** submit your form. Instead it brings you to a page for confirmation. To go back to editing your form, press the "Make a correction" link at the bottom of the confirmation page.

If you hit the "Confirm" button on the bottom of the confirmation page before you meant to, please reach out to reporting@stl.unitedway.org for assistance.

3. I hit BACK, RELOAD, or closed my browser. Can I recover the information I entered?

Form Assembly does not continuously save your work as you enter information. Because of this, we recommend you write all your responses outside Form Assembly and copy/paste into the form itself.

If you need to step away from your computer, refer to the section above titled "Save and Resume Forms."

4. The form I open does not look like the pictures you have in the guide. Did I do something wrong?

If the online form is not functioning correctly, you might be using an outdated version of your browser. Please make sure you are using the most up-to-date version of Microsoft Edge, Google Chrome, or Mozilla Firefox. If you are using the most up-to-date browser and you're still having problems, please reach out to reporting@stl.unitedway.org.

If you are not seeing certain questions on your forms, those questions may be conditional such that they only show up based on an answer to a previous question.

The conditional questions are noted in italics in the List of Questions section of this guide.

CONTENT QUESTIONS

5. What if I am unsure about what information I should enter?

Agency outcomes, program descriptions, client demographics, and any other questions about the *content* of information submitted should be directed to your agency's United Way staff contact. You can find your agency's staff contact in the United Way Contact List appendix of this document.

6. 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: <ul style="list-style-type: none"> • 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)
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7. What clients do I include in the program form?

The program form 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.

8. 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.

9. 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 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.

GENERAL/OTHER QUESTIONS

10. Who is my agency’s Portfolio Manager or United Way staff contact?

Portfolio Managers and United Way staff contacts are listed in the United Way Contact List appendix of this guide.

11. 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 allocation 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.

12. 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. Data collected during reporting help United Way understand services provided, clients served, impact achieved, use of funding. 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.

13. What if I my agency does not 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 check for any possible erroneous data entries. As a reminder, agencies are required to complete mandatory reporting to ensure the agency remains in good standing with United Way and are eligible for future funding opportunities.

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

B. Definitions

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

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.

Portfolio Manager

Portfolio Managers serve as liaisons between allocations volunteers and funded agencies and have field of service and nonprofit best practices expertise.

Primary Need Area

There are twenty-four priority needs defined in United Way's Community Needs Assessment. For each program, agencies should select the priority need that aligns most closely to the need the program addresses as the primary need area for that program. Programs may address multiple needs but only one primary need can be selected. This information is particularly helpful in data analysis.

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 County
Monroe	Warren
Randolph	
St. Clair	

C. United Way Contact List

Agency Name	Portfolio Manager	Portfolio Manager Email Address
Affinia Healthcare, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Agape Ministry of Warren County, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Alcoholic Rehabilitation Community Home	Julia Fuller	julia.fuller@stl.unitedway.org
Almost Home, Inc.	Anna Paul	anna.paul@stl.unitedway.org
American Cancer Society	Julia Fuller	julia.fuller@stl.unitedway.org
American Heart Association - Greater St. Louis Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
American Lung Association in Missouri	Julia Fuller	julia.fuller@stl.unitedway.org
American Red Cross of Greater St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
American Red Cross of South Central Illinois	Darlene Martin	darlene.martin@stl.unitedway.org
Amyotrophic Lateral Sclerosis Association St. Louis Regional Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
Annie Malone Children and Family Service Center	Julia Fuller	julia.fuller@stl.unitedway.org
Asthma and Allergy Foundation of America St. Louis Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
Betterment Federation, Inc. Carondelet Community	Anna Paul	anna.paul@stl.unitedway.org
Big Brothers Big Sisters of Eastern Missouri	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Big Brothers Big Sisters of Southwestern Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Bilingual International Assistant Services of Greater St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
Boy Scouts of America, Inc., Greater St. Louis Area Council	Darlene Martin	darlene.martin@stl.unitedway.org
Boys and Girls Clubs of Greater St. Louis, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Boys Hope Girls Hope of St Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Call for Help, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Cardinal Ritter Senior Services	Darlene Martin	darlene.martin@stl.unitedway.org
Caritas Family Solutions	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
CASA of Southwestern Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
CASA of St. Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Catholic Charities of Madison County	Anna Paul	anna.paul@stl.unitedway.org
Catholic Charities of St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org

Catholic Urban Programs	Anna Paul	anna.paul@stl.unitedway.org
Center for Hearing & Speech	Julia Fuller	julia.fuller@stl.unitedway.org
Center for Women in Transition	Anna Paul	anna.paul@stl.unitedway.org
Central Institute for the Deaf	Julia Fuller	julia.fuller@stl.unitedway.org
Child Center Marygrove	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Children's Home and Aid	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
College Bound	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Community Action Agency of St. Louis County, Inc.	Darlene Martin	darlene.martin@stl.unitedway.org
Community Care Center, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Community Council of St. Charles County	Anna Paul	anna.paul@stl.unitedway.org
Community Living, Inc.	Darlene Martin	darlene.martin@stl.unitedway.org
Compass Health Network	Julia Fuller	julia.fuller@stl.unitedway.org
Comtrea, Inc.	Darlene Martin	darlene.martin@stl.unitedway.org
Coordinated Youth and Human Services	Anna Paul	anna.paul@stl.unitedway.org
Cornerstone Center for Early Learning, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Covenant House Missouri	Anna Paul	anna.paul@stl.unitedway.org
Deaconess Faith Community Nurse Ministries	Julia Fuller	julia.fuller@stl.unitedway.org
Delta Center for Independent Living	Darlene Martin	darlene.martin@stl.unitedway.org
Delta Gamma Center for Children with Visual Impairments	Julia Fuller	julia.fuller@stl.unitedway.org
Doorways (Interfaith Residence)	Anna Paul	anna.paul@stl.unitedway.org
Down Syndrome Association of Greater St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
Duo Dogs, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Easter Seals Midwest	Darlene Martin	darlene.martin@stl.unitedway.org
Emmaus Homes, Inc.	Darlene Martin	darlene.martin@stl.unitedway.org
Employment Connection	Darlene Martin	darlene.martin@stl.unitedway.org
Epilepsy Foundation of Missouri and Kansas	Julia Fuller	julia.fuller@stl.unitedway.org
Epworth Children and Family Services, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
FamilyForward	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Fathers and Families Support Center	Darlene Martin	darlene.martin@stl.unitedway.org
Foster and Adoptive Care Coalition	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org

Gateway Region YMCA	Darlene Martin	darlene.martin@stl.unitedway.org
Gene Slay's Girls and Boys Club of St. Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Girl Scouts of Central Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Girl Scouts of Eastern Missouri	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Girl Scouts of Southern Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Girls Incorporated of St. Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Good Shepherd Children and Family Services	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Great Circle	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Guardian Angel Settlement Association	Anna Paul	anna.paul@stl.unitedway.org
Harris House Foundation	Julia Fuller	julia.fuller@stl.unitedway.org
Highland Area Christian Service Ministry	Anna Paul	anna.paul@stl.unitedway.org
Home Sweet Home	Anna Paul	anna.paul@stl.unitedway.org
Humanitri	Anna Paul	anna.paul@stl.unitedway.org
Illinois Center for Autism	Julia Fuller	julia.fuller@stl.unitedway.org
Immigrant Home English Learning Program (IHELP)	Darlene Martin	darlene.martin@stl.unitedway.org
IMPACT Center for Independent Living (CIL)	Julia Fuller	julia.fuller@stl.unitedway.org
Independence Center	Julia Fuller	julia.fuller@stl.unitedway.org
Infant Loss Resources	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
International Institute of Metropolitan St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org
Jewish Community Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Jewish Family and Children's Service	Julia Fuller	julia.fuller@stl.unitedway.org
Jewish Federation of St. Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Justine Petersen Housing & Reinvestment Corporation	Darlene Martin	darlene.martin@stl.unitedway.org
Kids In The Middle, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Kreative Kids Learning Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Land of Lincoln Legal Aid, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Legal Services of Eastern Missouri, Inc.	Anna Paul	anna.paul@stl.unitedway.org
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Lessie Bates Davis Neighborhood House, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Leu Civic Center, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org

LifeBridge Partnership	Julia Fuller	julia.fuller@stl.unitedway.org
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Lutheran Child and Family Services of Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Lutheran Family and Children's Services of Missouri	Julia Fuller	julia.fuller@stl.unitedway.org
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Megan Meier Foundation	Julia Fuller	julia.fuller@stl.unitedway.org
Memory Care Home Solutions	Darlene Martin	darlene.martin@stl.unitedway.org
MERS/Missouri Goodwill Industries	Darlene Martin	darlene.martin@stl.unitedway.org
MindsEye Radio	Darlene Martin	darlene.martin@stl.unitedway.org
Mission St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org
NAMI St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
National Kidney Foundation Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
National Multiple Sclerosis Society - Gateway Area Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
Northside Youth And Senior Service Center, Inc.	Darlene Martin	darlene.martin@stl.unitedway.org
NPower	Darlene Martin	darlene.martin@stl.unitedway.org
Nurses for Newborns	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Oasis Women's Center	Anna Paul	anna.paul@stl.unitedway.org
Operation Food Search, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Paraquad, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Parents As Teachers National Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Parents As Teachers National Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Peter & Paul Community Services	Anna Paul	anna.paul@stl.unitedway.org
Pony Bird, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Preferred Family Healthcare	Julia Fuller	julia.fuller@stl.unitedway.org
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Prevent+Ed	Julia Fuller	julia.fuller@stl.unitedway.org
Provident Behavioral Health	Julia Fuller	julia.fuller@stl.unitedway.org

R3 Development NFP	Darlene Martin	darlene.martin@stl.unitedway.org
Ready Readers	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Rebuilding Together St. Louis	Anna Paul	anna.paul@stl.unitedway.org
Riverbend Family Ministries, NFP	Darlene Martin	darlene.martin@stl.unitedway.org
Riverbend Head Start and Family Services, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Safe Connections	Julia Fuller	julia.fuller@stl.unitedway.org
Saint Louis Counseling	Julia Fuller	julia.fuller@stl.unitedway.org
Saint Louis Crisis Nursery	Anna Paul	anna.paul@stl.unitedway.org
Senior Services Plus	Anna Paul	anna.paul@stl.unitedway.org
Sherwood Forest Camp, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Society of St. Vincent De Paul, Edwardsville	Anna Paul	anna.paul@stl.unitedway.org
SouthSide Early Childhood Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
St. Joseph Institute for the Deaf	Julia Fuller	julia.fuller@stl.unitedway.org
St. Louis Arc	Darlene Martin	darlene.martin@stl.unitedway.org
St. Louis Area Foodbank, Inc.	Anna Paul	anna.paul@stl.unitedway.org
St. Louis Public Schools Foundation	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
St. Louis Society for the Blind and Visually Impaired	Darlene Martin	darlene.martin@stl.unitedway.org
St. Martha's Hall	Anna Paul	anna.paul@stl.unitedway.org
St. Patrick Center	Anna Paul	anna.paul@stl.unitedway.org
St. Vincent Home for Children	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Starkloff Disability Institute	Darlene Martin	darlene.martin@stl.unitedway.org
STL Village	Darlene Martin	darlene.martin@stl.unitedway.org
Sts. Joachim & Ann Care Services	Anna Paul	anna.paul@stl.unitedway.org
The Eagle's Nest of St. Clair County	Anna Paul	anna.paul@stl.unitedway.org
The Oasis Institute	Darlene Martin	darlene.martin@stl.unitedway.org
The Salvation Army	Anna Paul	anna.paul@stl.unitedway.org
The SoulFisher Ministries	Darlene Martin	darlene.martin@stl.unitedway.org
Turning Point Advocacy Services	Anna Paul	anna.paul@stl.unitedway.org
United 4 Children	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
United Cerebral Palsy Heartland	Darlene Martin	darlene.martin@stl.unitedway.org

United Services for Children	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
University City Children's Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Unleashing Potential	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Urban League of Metropolitan St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org
Violence Prevention Center of Southwestern Illinois	Anna Paul	anna.paul@stl.unitedway.org
Visiting Nurse Association Greater St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org
Vivent Health	Julia Fuller	julia.fuller@stl.unitedway.org
VOYCE	Darlene Martin	darlene.martin@stl.unitedway.org
Webster Child Care Center at Laclede Groves	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Wesley House Association	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Women's Safe House	Anna Paul	anna.paul@stl.unitedway.org
Wyman Center, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Young Men's Christian Association of Edwardsville	Darlene Martin	darlene.martin@stl.unitedway.org
Young Women's Christian Association of Southwestern Illinois	Julia Fuller	julia.fuller@stl.unitedway.org
Youth and Family Center	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Youth In Need	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
YWCA of Metropolitan St. Louis	Anna Paul	anna.paul@stl.unitedway.org