



## United Way of Mason County Grant Reporting-General Checklist 2018

The following is a general checklist to assist with grant reporting requirements

Special Note: As you are likely aware, funding to non-profits is being cut nationwide and thus, becoming increasingly competitive. This means non-profits are being asked to do more with less; provide more transparency and in-depth reporting; utilize a collective approach to improving community health and wellness; become more accountable, reliable and valid; and enhance data and reporting. Even the Federal government is championing this new movement. For example, according to [US Spending.gov](http://USpending.gov):

In May 2014, President Obama signed the Digital Accountability and Transparency Act of 2014 (DATA Act) (P.L. 113-101) into law... It will not only make it easier to understand how the Federal government spends taxpayer dollars but will also serve as a tool for better oversight, data-centric decision-making, and innovation both inside and outside of government.

In addition, the [OMB Uniform Grant Guidance of 2014](#) from the Federal Register – the Daily Journal of the United States Government – is clear that those the Federal government continues to fund are going to be held to higher standards of reporting, accountability and transparency.

The United Way is committed to increasing its community-wide investment in Mason County; to have a greater impact on our populations health and wellness. However, we must also improve our (the United Way of Mason County) reporting to large granting organizations. To do this, we will be holding those we fund (you the grantee) to higher standards of transparency and accountability; reporting that is more in-depth; and the demonstration of collective and evidence based approaches and/or actions.

Please circle the corresponding #'s and letters you directly target with the funds we provide you:

<p><b>1. Income</b> - Helping families become financially stable and independent, while ensuring that basic needs are met</p> <p><b>A.</b> Families have support for basic needs, including shelter and food</p> <p><b>B.</b> Youth and adults develop financial literacy skills</p> <p><b>C.</b> Lower-income families move toward financial stability</p> <p><b>D.</b> Community members have resources to overcome disasters and emotional or financial crises.</p>	<p><b>2. Education</b> - Helping children and youth achieve their potential</p> <p><b>E.</b> Children enter kindergarten developmentally on track in terms of literacy and social, emotional, and intellectual skills</p> <p><b>F.</b> Third graders read at grade-level proficiency</p> <p><b>G.</b> Young people graduate from high school</p>	<p><b>3. Health</b> - Improving people's health</p> <p><b>H.</b> Community members have access to healthier foods</p> <p><b>I.</b> Children and adults decrease overweight and obesity and associated chronic diseases</p> <p><b>J.</b> Community members have access to basic and preventative health services</p> <p><b>K.</b> Youth and adults are healthy and avoid risky behaviors</p> <p><b>L.</b> Seniors and people with disabilities maximize their self-sufficiency</p>
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Topic	Circle One					Comments
We have a strategic plan in place specific to those objectives we circled up above	No	Develop Stage	Nearly Done	Yes	N/A	
We have clearly defined what activities, action items, initiatives and/or tactics the funds will be used for to meet the above priorities, goals and/or objectives	No	Develop Stage	Nearly Done	Yes	N/A	

We have specified how we will track data and indicators specific to those objectives we circled above	No	Develop Stage	Nearly Done	Yes	N/A	
We have a system or way to specifically track how we use the funds we were awarded	No	Develop Stage	Nearly Done	Yes	N/A	
We are currently partnered with or partnering with key stakeholders to achieve the objectives listed above and to increase the impact of the funds we were awarded	No	Develop Stage	Nearly Done	Yes	N/A	List the stakeholders or coalitions:
We are utilizing social media, video, photo, interviews, announcements, sign postings to market and to demonstrate the use of the funds in action (E.g. you used the funds to obtain books and rented space at a community event to hand them out and have videos, interviews, new articles, and photos of events, and posted them to Facebook, Twitter, Instagram, etc.).	No	Develop Stage	Nearly Done	Yes	N/A	List all specifics you have done or will do (we will also want copies and/or links):
Define the target population targeted with the funds - Demographics (E.g. age, income, education, location, gender, race, ethnicity, language, marital status, family size, employment status, etc..).						
Identify all ways the funds were utilized (define the % allocation of funds if used for multiple components).	Overhead Fees Materials/Supplies Service Employees Other (please list):		Marketing Miscellaneous Space rent Gas Food/Beverage Other (please list):			
List out what events/activities you have planned over the next 6-months						

How did you determine the community need you are targeting and the target population (E.g. community health assessment, BRFSS, HYS, local survey, DOH, DSHS, Public Health, etc...).					
How well does the program demonstrate a meaningful linkage between community needs, program activities and outcomes?	None	OK	Good	Great	Comments
What are the intended measurable outcomes, what will you be tracking?					
Does the agency have (circle):	balanced budget adequate reserves		diversified funding Other funding options		

### Additional Information

- Please provide a copy of your plan of action, strategic plan or a description of this program/initiative
- Provide any obtained photos, videos, news articles, websites, social media posts, interviews, or other relevant marketing and/or promotional material that were directly related to the program and funding we provided.
- Please provide relevant data and outcome reports, or what you have in process thus far

### Please Complete the following:

<p><b>What is/are the name(s) of the program(s) or initiative(s) targeting those priorities, goals or objectives you listed above? If no name, succinctly define/summarize.</b></p> <p><b>List the reference number(s) and/or letters(s) that correspond to what you identified in the list above</b></p>		
<p><b>Are you specifically tracking the funds we awarded you and able to provide any necessary receipts, reports, inputs? (E.g. computer program, software, accounting system)</b></p>		

<p><b>Do you have a Strategic Plan in place with Goals, Objectives, Strategies, Activities/and or Action Items?</b></p>	<p>Example: The overall goal is to <i>Improve 1<sup>st</sup> Grade-School Readiness</i> by achieving an Underlying Goal of <i>Improving Literacy Rates among low-income (below Federal Poverty Level) populations</i>. To do this, one objective was to <i>distribute 1,000 books to those populations and hold reading events</i>.</p>
<p><b>Explain them and how you use <i>specifically</i> the funds to achieve them.</b></p>	<p>Example: We used the \$5,000 awarded by the United Way to complete the following:</p> <ul style="list-style-type: none"> <li>○ purchased 500 books</li> <li>○ market and pay for space at 3 local reading events where we read to children, explained the importance of reading at home</li> <li>○ distributed books to 450 families</li> </ul>
<p><b>Please describe how you marketed (note, we will want copies or links to all items).</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Interviews (radio, news, TV)</li> <li><input type="checkbox"/> Social Media Posts (Facebook, Twitter, Next Door app, Instagram, Reddit, VK, Vine, Tumblr)</li> <li><input type="checkbox"/> Flyers, Signage, Digital</li> <li><input type="checkbox"/> Press Releases</li> <li><input type="checkbox"/> Community Announcements</li> <li><input type="checkbox"/> Phone Calls and/or Emails</li> <li><input type="checkbox"/> Photos and or Videos</li> </ul> <p>Other:</p>

Provide us related data (E.g. # of views, how many reached, # distributed, # emails or calls made, what people indicate as to how they heard about the event, # of posts liked, # of posts forwarded, # of community announcements, etc.).

**Thank You!**



**GIVE. ADVOCATE. VOLUNTEER.**  
**LIVE UNITED**   
**UNITED WAY OF MASON COUNTY**