



United Way  
for Southeastern Michigan

# United Way Mid-Year Review Partner Information Session

December 16, 2009

# Agenda



- Welcome
- Reporting Requirements
- Necessary Documents
- Timeline
- Next Steps

# Reporting Requirements



- **2009-2010 Grant Award**
  - Mid-year program reporting
  - Mid-year financial reporting and projected financials for the next 6 months
- **Grant Contingencies**
  - Funding renewed annually and will be adjusted based on performance, campaign results and approval of United Way SEM Board

# Reporting and Evaluation



- **Reporting Timeline**

- Mid-Year Reports due: January 29<sup>th</sup>, 2010 at 5pm
- No extensions
- Please contact your liaison if you have any questions
- Liaison site visits and mid-year reviews will be utilized to determine an agencies capacity, performance and alignment to the Agenda for Chance and United Way SEM's long-term initiatives.

# Reporting Requirements

## On-line Data Manager



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## 09-10 Mid-Year Reporting

All **red/highlighted** items are mandatory for reporting

- Program Reporting Form: CI - Program Reporting 2 (2009 - 2010)
  - Provide projected process objectives, clients services and progress on outcomes
- Financial Reporting Form: CI - Project Budget and Financial Reporting (2009 - 2010)
  - Provide detail of how dollars were actually spent and how dollars will be spent over the next 6 months

**Due January 29<sup>th</sup>, 5pm**

## Review of Next Steps (cont.):



- Continue to adhere to PMOU
- Align designations within the impact areas
- Submit agency audits 5 months after the end of agency fiscal year
- Additional Webinars will be available: January 11<sup>th</sup> 10:30-12:00pm and January 14<sup>th</sup> from 3:00-4:30pm
- Archived webinars are available online at [www.UnitedWaySEM.org/partnertools/resources.html](http://www.UnitedWaySEM.org/partnertools/resources.html)

# Questions



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- Please submit questions by typing them into the Questions box on the right-hand side of your computer screen.
- Questions will be answered in the order that they are received.