**2022-23 Community Investments Grants Reporting Template**

*Open for grantee submission from Monday, July 10 – Friday, August 11, 2023.*

This template is being made available in order to enable your organization to get a head start on data collection and other preparation you may want to do before the official report opening on July 10th. **Note: this template is for reference and preparation purposes ONLY. You will still be required to submit your report in United Way’s grantee portal. Reports will NOT be accepted via this Word template.** Please contact your Program Officer directly with any questions you have!

**Organization Name:**

**Organization Contact Information:**

**Organizational Demographics**

In this section, you will be asked to report on the leadership composition and number of participants served by your organization over the past year. We ask, if you are able, to break down this information by different groups such as race/ethnicity, geography, age, and income. If you are not able to provide data in this format, there is no penalty.

We ask for the data to be broken down by group being we believe it will help uncover hidden trends and disparities. These understandings help us inform public policy and funding decisions, and can help organizations better understand how to work alongside communities experiencing underinvestment.

The data categories for race/ethnicity used in this report are aligned with the US Census. We recognize more detailed ancestry/ethnic origin categories are preferred and more effective at telling a full story. For example, the 452 Minnesota school districts who in 2022 voluntarily reported student data by detailed ancestry/ethnic origins (AEO) have been instrumental in uncovering nuanced educational opportunity gaps. Greater Twin Cities United Way is working to build its capacity toward more detailed data collections and utilization.

Finally, we had indicated in the Community Investments RFP that we would ask for information to be broken down by group for portfolio-level indicators. **Based on further conversations with funded partners, portfolio-level indicators do not need to be broken down by race, income, and geography in this report.**

***Leadership Representation***

Greater Twin Cities United Way recognizes that collecting data around dimensions of identity is inherently sensitive and complex, and we take this responsibility seriously. The [2022 Giving in Minnesota report](https://mcf.org/sites/default/files/files/pages/2022%20Giving%20in%20MN%20Reporta_0.pdf) shows that only 27% of grants from community and public foundations went to BIPOC-led organizations; we recognize this number as a result of historically intentional underinvestment and seek to continuously invest more deeply and intentionally into BIPOC-led organizations, and to influence our peers to do the same. Given this commitment, we are interested in understanding more about how your Board and organizational Senior Leadership composition reflect the communities you serve.

How many total individuals serve on your **Board**?

Total \_\_\_\_\_\_\_\_\_

How many of your **Board members** **self-identify** as the following? *Board members may self-identify in multiple categories; please feel free to duplicate your count*

*Racial & ethnic identity*

Asian American/Pacific Islander/Asian \_\_\_\_\_\_\_\_

Black/African American/African/Black Caribbean \_\_\_\_\_\_\_\_

Hispanic/Latino/Latina/Latinx/Latiné \_\_\_\_\_\_\_\_

Middle Eastern/North African \_\_\_\_\_\_\_\_

Native American/American Indian/Indigenous \_\_\_\_\_\_\_\_

White/European \_\_\_\_\_\_\_\_

Multi-racial/Multi-ethnic (2+ Races/Ethnicities) \_\_\_\_\_\_\_\_

Another racial/ethnic identity \_\_\_\_\_\_\_\_

Unreported \_\_\_\_\_\_\_\_

How many individuals are part of your **Senior Leadership team**? We define senior leaders as those who engage in such business activities as setting organizational goals, building strategic plans, and making organizational decisions.

Total  *\_\_\_\_\_\_\_\_*

How many of your **Senior Leaders** **self-identify** as the following?  *Please feel free to duplicate your count if senior leaders self-identify in multiple areas.*

*Racial & ethnic identity*

Asian American/Pacific Islander/Asian \_\_\_\_\_\_\_\_

Black/African American/African/Black Caribbean \_\_\_\_\_\_\_\_

Hispanic/Latino/Latina/Latinx/Latiné \_\_\_\_\_\_\_\_

Middle Eastern/North African \_\_\_\_\_\_\_\_

Native American/American Indian/Indigenous \_\_\_\_\_\_\_\_

White/European \_\_\_\_\_\_\_\_

Multi-racial/Multi-ethnic (2+ Races/Ethnicities) \_\_\_\_\_\_\_\_

Another racial/ethnic identity \_\_\_\_\_\_\_\_

Unreported \_\_\_\_\_\_\_\_

***Participant demographics***

Please complete the demographic information to the best of your ability for the report period of July 1, 2022 – June 30, 2023, using unduplicated counts of participants served where possible. For the ethnicity and racial categories, duplicate as necessary to fully represent participant identities.

*We use the information you share with us in this section to better understand the communities our grantee partners are reaching and serving.*

*Note for organizations working with proxy sources of information, such as free/reduced lunch-defined income data: Please use your best judgment as to how to align your data with our income categories.*

|  |  |
| --- | --- |
| **Category** | **Results** |
| **Participants served:** | |
| Total Individuals Served |  |
| **Age:** | |
| 0-4 years |  |
| 5-17 years |  |
| 18-24 years |  |
| 25-44 |  |
| 45-64 |  |
| 65+ years |  |
| Age Unreported |  |
| **Ethnicity:** | |
| Hispanic/Latino/Latina/Latinx/Latiné |  |
| Non-Hispanic/Latino/Latina/Latinx/Latiné |  |
| Ethnicity Unreported |  |
| **Race:** | |
| Asian American/Pacific Islander/Asian |  |
| Black/African American/African/Black Caribbean |  |
| Middle Eastern/North African |  |
| Multi-racial (2+ races) |  |
| Native American/American Indian/Indigenous |  |
| White/European |  |
| Another racial identity |  |
| Race Unreported |  |
| **Income:** | |
| Below 100% of [Federal Poverty Guidelines](https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines) |  |
| Between 100 – 200% of Federal Poverty Guidelines |  |
| Above 200% of Federal Poverty Guidelines |  |
| Income Unreported |  |
| **County** |  |
| Hennepin |  |
| Ramsey |  |
| Anoka |  |
| Washington |  |
| Dakota |  |
| Scott |  |
| Carver |  |
| Chisago |  |
| Isanti |  |
| County unreported |  |

**Outcomes and Indicators: July 1, 2022- June 30, 2023**

Please enter your 2022-2023 results for each outcome area below. NOTE: indicators for all outcome areas are below, but you will only see indicators for the outcome areas in which your organization has been funded in the report itself. If you aren’t sure the areas you’ve been funded in, please contact your Program Officer directly or at [partners@gtcuw.org](mailto:partners@gtcuw.org) .

The recommended word limit for all open-ended narrative questions is 500 words.

**Portfolio Level Outcomes**

**Career and Future Readiness**

***Fixed Measures***

* Number of youth served through Career and Future Readiness programs and services
* Number of youth who build strong social-emotional learning skills, mindsets and behaviors

**Optional: Contextualizing Career and Future Readiness outcomes**

Please use this space to share any information relevant to your data, data collection, or trends you’ve observed in this outcome area that you’d like us to be aware of.

**Reflections on Career and Future Readiness strategies**

Looking back over the last year, please briefly describe the approaches you found to be the most effective in your work to ensure that **youth are equipped with the knowledge, skills, mindsets, and relationships to choose and direct their own future path and contribute to their communities**. What did you observe related to how these strategies disrupt inequities in the Career and Future Readiness field?

**Housing**

***Fixed Measures***

* Number of individuals served through housing programs and services
* Number of individuals who maintain housing because of programs and services
* Number of individuals who obtain housing because of programs and services

**Optional: Contextualizing Housing outcomes**

Please use this space to share any information relevant to your data, data collection, or trends you’ve observed in this outcome area that you’d like us to be aware of.

**Reflections on Housing strategies**

Looking back over the last year, please briefly describe the strategies you found to be the most effective in your work to ensure that **homelessness is prevented where possible and where not, is rare, brief, nonrecurring.** What did you observe related to how these strategies disrupt inequities in the Housing field?

**Early Childhood Education**

***Fixed Measures***

* Number of children served through Early Childhood Education programs and services
* Number of adults served through Early Childhood Education programs and services
* Number of children who are on-track to be ready for kindergarten
* Number of children not on-track for school who demonstrate growth

**Optional: Contextualizing Early Childhood Education outcomes**

Please use this space to share any information relevant to your data, data collection, or trends you’ve observed in this outcome area that you’d like us to be aware of.

**Reflections on Early Childhood Education strategies**

Looking back over the last year, please briefly describe the strategies you found to be the most effective in your work to ensure that **children and their parents enter kindergarten ready to learn & thrive.**  What did you observe related to how these strategies disrupt inequities in the Early Childhood Education field?

**Economic Opportunity**

***Fixed Measures***

*Employment & Training Strategies*

* Number of individuals served through employment and training programs and services
* Number of individuals who complete at least one training or education component
* Number of individuals who obtain employment
* Average wage at program enrollment
* Average wage at placement
* Average wage at 12 months of employment (if you collect this data)
* Estimated % of participants who retain their job for 12 months or more  (if you collect this data)

*Entrepreneurship Strategies*

* Number of individuals served through entrepreneurship programs and services
* Amount of loans/grants dispersed to entrepreneurs (if applicable)
* Number of jobs created (optional, if you collect this data)
* % of businesses who achieve sustainability or growth (please assess however your organization defines “sustainability” and “growth”)
* Text box: Please provide a few examples of how your organization defines sustainability and/or growth

*Financial Accessibility Strategies*

* Number of individuals enrolled in the product or service
* Number of participants who report increased wealth /financial stability

**Optional: Contextualizing Economic Opportunity outcomes**

Please use this space to share any information relevant to your data, data collection, or trends you’ve observed in this outcome area that you’d like us to be aware of.

**Reflections on Economic Opportunity strategies**

Looking back over the last year, please briefly describe the strategies you found to be the most effective in your work to ensure that **adults enter the workforce prepared for skilled employment and improved financial health.**What did you observe related to how these strategies disrupt inequities in the Economic Opportunity field?

**Food Security**

*Food Security Strategies*

* Number of individuals served through food program strategies categorized as food shelves, meal programs or food banks.

*Food Security Strategies*

* Number of individuals served by long-term food security programs and services.
* Number of individuals that report increased food security.

**Optional: Contextualizing Food Security outcomes**

Please use this space to share any information relevant to your data, data collection, or trends you’ve observed in this outcome area that you’d like us to be aware of.

**Reflections on Food Security strategies**

Looking back over the last year, please briefly describe the strategies you found to be the most effective in your work to ensure that **residents in our region have access to an efficient, high-quality system to ensure food security.**What did you observe related to how these strategies disrupt inequities in the Food Security field?

**Additional Narratives**

Additional Narratives are questions required of all funded organizations, regardless of which area the organization has been funded in. The recommended word limit for all open-ended questions is 500 words.

Please provide an example that illustrates how your programming and services have impacted the specific communities you support.

GTCUW’s new [Connecting the Dots report](https://www.gtcuw.org/our-work/nonprofit-partnerships/connecting-the-dots/) will be produced annually for policy makers, funders, and other stakeholders, and is informed by nonprofit partners. The report provides concrete policy and funding recommendations to foster systems change and support a state where all people thrive, regardless of their race, place of residence or income. **What would you like policy makers and funders to know about the challenges facing your community and the systems changes that would improve conditions for your organization?**

**Customized Outcomes**

All organizations were asked to commit to additional outcomes, which are indicated as “customized” outcomes on your grant agreement. These outcomes are intended to help us better understand your work and the strategies you employ that disrupt systemic inequities impacting your community.

We would love to visit with your organization for 60-90 minutes this fall. The goal of these visits are to continue to build a relationship with you; learn more about your work to disrupt inequities in your community and within your organization; and celebrate your successes. Please indicate if you would prefer this visit to be in person or virtual. You can expect to receive a follow up email in August from your Program Officer with an agenda and additional details for scheduling.

* I prefer to visit with my Program Officer in person at one of our organization’s locations.
* I prefer to visit with my Program Officer virtually.
* Either in-person or virtual works for my organization.

Please provide the name and contact information for the individual with whom we should coordinate scheduling this visit, if different from your organization’s Executive Director.

Name:

Title:

Phone:

Email:

**Financial Due Diligence**

Each year, Greater Twin Cities United Way conducts a financial health assessment of our nonprofit partners to help ensure we are responsible stewards of the funds entrusted to us by our community. This assessment helps us more fully understand the complex issues and constraints facing our partners. Greater Twin Cities United Way staff will conduct a primary financial review of the documents and answers below, and we will follow up with your organization directly if we have any additional questions.

* Most recent 990
* Most recent audited financials (internal financial statements are allowed if an external audit is not required)
* Current year board-approved budget

What is your projected organizational budget for the current fiscal year?  Please provide a dollar amount (ex. $1,225,000).   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Narrative: Please explain any major changes between your organization’s originally projected and final actual expenses and revenue (+/- 10%) that occurred between 7/1/22 – 6/30/23.

Please explain any other shifts in your organization’s environment that had an impact on your organization’s financials and operations in the past year (ex. One of your major funders shifted their funding focus, government funding in a particular area decreased, etc.)

Please note any major changes in board or organizational senior leadership since Summer 2022 (i.e. anything beyond the typical transition due to term limits and/or board member relocation/availability, such as: several board members stepped down, board restructured; key leadership transition, key positions open, etc.).

**Nonprofit Partnership Survey**

We invite you to fill out a surveysharing about your experiences as a nonprofit partner. Your feedback will be used to strengthen our approach to supporting, collaborating with, and advocating for nonprofits. Any information shared in this survey is entirely anonymous, confidential, and has no bearing on funding.

* A brief survey will be linked in the official report

**Corporate Partnership Opportunities**

We are committed to sharing opportunities with our corporate partners for ways that they can support the nonprofit sector beyond grantmaking, including utilizing fee-for-service services you offer; examples might include catering, consulting, products for sale, or event space rental. If your organization is interested in being added to the vendor lists of our corporate partners, please indicate your service types below:

* Consulting
* Catering, café, CSA, or farmers market
* Programming available to those above 200% of the poverty level
* Event space rental
* Other fee-for-service offerings or sale of products/services (i.e., metal recycling service, jewelry for sale made by participants, etc.)
* Other (fill in the blank)

Optional: Feel free to provide any further information about your goods and services available here.

Instead of having a separate report to complete, recipient organizations of Arise Project, Women United, and/or Ernst & Young grants will find your report questions at the end of the official report form when it opens on July 10th. Please contact your Program Officer with any questions.