

## 2022-23 Mid-Year Performance Report Narrative Questions and Instructions

For Funding Considerations for Year 3 - (July 1, 2023 to June 30, 2024)



Listed below are the Narrative Questions and Instructions for the 2022-23 Mid-Year Performance Report. This Report will be used for funding considerations for Year 3 (July 1, 2023 to June 30, 2024). Please note that the questions are listed in the Heart of Illinois United Way Electronic Grant and Reporting System. Partner agencies should submit report responses in the System.

This handout is provided as a summary of the questions/instructions prompts included in the System.

Application Section	Question Number	Question	Instruction Prompt
Program Summary	1	Provide a brief summary of the client population served, program goals and services provided. (Max. 250 words)	<u>Instructions for Question 1</u> - Responses should include program hours of operation/service, site locations and activities provided.
Program Summary	2	Describe the characteristics and demographics of the client population to be served by the program. (Max. 200 words)	<u>Instructions for Question 2</u> - Responses should include an estimate of the client demographics: age, race, ethnicity, and county residences within the HOIUW Service Area. Other notable characteristics of the intended client population should be included. For example, Veteran status, single heads of households, homeless or at-risk of homelessness, individuals with disabilities, individuals with chronic illnesses, etc.
Program Summary	3	What is the projected number of Clients to be served by this program in 2022-23 (Year 2)?	<u>Instructions for Question 3</u> - Refer to the Indicators (HOIUW Benchmarks) section of this Report and enter the number Served listed in the Revised Annual total.
Program Summary	4	What is the projected number of Units of Service to be provided under this program in 2022-23 (Year 2)?	<u>Instructions for Question 4</u> - Refer to the Program Activities and Outputs section of this Report and enter the number of Units of Service listed in the Revised Annual total.
Program Summary	5	Does the program have a fixed capacity for services and/or clients? (Prompt Default is 'No')	<u>Instructions for Question 5</u> - Programs with fixed capacity have daily client limits due to space limitations and laws/regulations for population density.  Examples of programs with fixed capacity include, but are not limited to: child care centers with a finite number of slots and/or teacher/student ratio requirements; housing programs with a fixed number of beds/units; and programs with legal or funder-enforced limits.
Program Summary	Conditional Field for Question 5	Describe the program's fixed capacity related to services and/or clients. (Max. 75 words)	<u>Instructions for Conditional Field for Question 5</u> - Explain the fixed capacity of the program and include the maximum number of clients to be served when the program is at full capacity.  Example: The ABC shelter has a total of 50 beds available to clients, which is the maximum capacity on any given night.

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<i>Program Summary</i>	6	Provide a success story about a client served in the first 6 months of the program. Please protect the client's confidentiality when disclosing information. <i>(Max. 200 words)</i>	No Prompt Provided
<i>Program Progress: Outputs and Units of Service</i>	1	What is the program's Year-to-Date Total Unduplicated Client Count as of December 31, 2022?	<u>Instructions for Question 1</u> - Refer to the Indicators (HOIUW Benchmarks) section of this Report and enter the YTD-Unduplicate Served total. Think of your Unduplicated Client count like a program roster - each client should only appear on the list once.
<i>Program Progress: Outputs and Units of Service</i>	2	What are the program's Year-to-Date Total Units of Service as of December 31, 2022?	<u>Instructions for Question 2</u> - Refer to the Program Activities and Outputs section of this Report and add together the Units of Service listed for Quarter 1 and Quarter 2 of each program activity.
<i>Program Progress: Outputs and Units of Service</i>	3	Describe what is included in a Unit of Service for the program. <i>(Max. 100 words)</i>	<u>Instructions for Question 3</u> - HOIUW defines a Unit of Service as 1 hour of either direct or indirect services to clients. Examples of Units of Service could be direct client contact hours, advocacy, connection to other resources, data entry, transportation, etc.
<i>Program Progress: Outputs and Units of Service</i>	4	Describe the program's current Output results. <i>(Max. 250 words)</i>	<u>Instructions for Question 4</u> - At Mid-Year, Output numbers should be at or above 50% of annual projection. Indicate whether the program is on target to meet the annual projections of Outputs. If Outputs are exceeding the 50% of annual projection, describe why Outputs are exceeding projection at Mid-Year and include any impacts on program budget, staff, volunteers and/or service delivery.  If Outputs are below the 50% of annual projection, include any significant barriers to client recruitment and/or retention and how these barriers are being addressed through CIPs. Ensure CIP(s) are referenced in narrative to address Output issues.

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<i>Program Progress: Outputs and Units of Service</i>	5	Describe the program's current Units of Service results. <i>(Max. 250 words)</i>	<u>Instructions for Question 5</u> - At Mid-Year, Units of Service (UOS) numbers should be at or above 50% of annual projection. Indicate whether the program is on target to meet the annual projections of UOS. If UOS are exceeding the 50% of annual projection, describe why UOS are exceeding projection at Mid-Year and include any impacts on program budget, staff, volunteers and/or service delivery.  If UOS are below the 50% of annual projection, describe any difficulties in program service delivery and/or measurement of service that are impacting UOS. Ensure CIP(s) are referenced in narrative to address UOS issues.
<i>Program Progress: Outcomes</i>	1	How many Indicators (HOIUW Benchmarks) is the program measuring?	<u>Instructions for Question 1</u> - Refer to the Indicators (HOIUW Benchmarks) section of this Report and total the number of Indicators listed. Note there could be multiple (1 of 3) Indicators listed for each Outcome. Ensure all Indicators are included.
<i>Program Progress: Outcomes</i>	2	Describe the program's current Outcome results for each Indicator (HOIUW Benchmarks) listed above. <i>(Max. 250 words)</i>	<u>Instructions for Question 2</u> - At Mid-Year, Outcome results should be close to or achieving the prescribed HOIUW Benchmark for each Indicator. Indicate whether the program is on target to meet the Outcome projections in each Indicator. If Outcome results are below target, include any significant challenges that are impeding client or program success and how these challenges are being addressed through CIPs. Ensure CIP(s) are referenced in narrative to address Indicators issues.
<i>Program Progress: Measurement Tool(s)</i>	1	Is the Measurement Tool(s) used for the program evidence-based and/or third party accredited? <i>(Prompt Default is 'Yes')</i>	<u>Instructions for Question 1</u> - !Note! Grant Reviewers will be able to review the uploaded Measurement Tool(s) during review. Uploaded Tool(s) can be found in the Measurement Tools Tab in the grants system.
<i>Program Progress: Measurement Tool(s)</i>	Conditional Field for Question 1	If yes, describe the evidence-based source and/or accreditation of each Measurement Tool. Then, explain why it is reflective of programming and specifically designed for outcome(s) that is connected to program service delivery. <i>(Max. 200 words)</i>	No Prompt Provided
<i>Program Progress: Measurement Tool(s)</i>	Conditional Field for Question 1	If no, described how each tool was constructed. Then, explain why it is reflective of programming and specifically designed for outcome(s) that is connected to program service delivery. <i>(Max. 200 words)</i>	No Prompt Provided

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<i>Program Progress: Measurement Tool(s)</i>	2	Describe the process and frequency of when the Measurement Tool(s) have been administered within the first 6 months of the program. <i>(Max. 350 words)</i>	<u>Instructions for Question 2</u> - Explain when the Measurement Tool(s) is administered, who within the agency administers the Tool(s), how is the data collected (i.e. - software/data tracking system) and what data is reported.
<i>Budget Narrative and Fund Diversity</i>	1	Enter the amount of the total program budget.	<u>Instructions for Question 1</u> - The total program budget should be the same amount listed in both the Total Income and Total Expense Line Items of the Revised Annual Program Budget and Year-to-Date Actuals from the previous section.
<i>Budget Narrative and Fund Diversity</i>	2	Enter the amount of the total surplus/deficit.	<u>Instructions for Question 2</u> - The total surplus/deficit should be the amount listed in the Total Surplus/Deficit Line Item of the Year-to-Date Actuals budget column from the previous section.
<i>Budget Narrative and Fund Diversity</i>	3	What is the percentage of the total Surplus/Deficit amount to the total program budget?	<u>Instructions for Question 3</u> - To determine the percentage, divide the total Surplus/Deficit amount by the total program budget amount.
<i>Budget Narrative and Fund Diversity</i>	4	Explain the reason(s) for either a Surplus or Deficit in the Year-To-Date actuals of the program budget. <i>(Max. 150 words)</i>	<u>Instructions for Question 4</u> - Reasons for either a surplus or deficit could include, but are not limited to, funding losses, delayed payments, uncollectible fees, timing of purchases and/or additional resources secured.
<i>Budget Narrative and Fund Diversity</i>	5	What expense line items of the program budget were Heart of Illinois United Way grant funds used for in the past 6 months? <i>(Max. 150 words)</i>	No Prompt Provided
<i>Budget Narrative and Fund Diversity</i>	6	Are Heart of Illinois United Way grant funds used as match for other funding sources for the program? <i>(Prompt Default is 'No')</i>	No Prompt Provided
<i>Budget Narrative and Fund Diversity</i>	Conditional Field for Question 6	If yes, please indicate the funding source(s) and amount(s) of match. <i>(Max. 100 words)</i>	No Prompt Provided
<i>Budget Narrative and Fund Diversity</i>	7	How does the agency continue to diverse funding to support and sustain the program? <i>(Max. 150 words)</i>	No Prompt Provided

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<i>Program Staff</i>	1	Describe program staffing in terms of recruitment, retention and/or turnover. How has the agency minimized the effect of staffing changes on programming? <i>(Max. 200 words)</i>	<u>Instructions for Question 1</u> - Describe items such as recruitment strategies, training opportunities, internal career advancement and/or planned position turnover.
<i>Program Staff</i>	2	Describe the program staff role in the development and execution of CIPs. <i>(Max. 200 words)</i>	<u>Instructions for Question 2</u> - Describe program staff knowledge of and engagement in achieving targeted Outputs, Units of Service and Outcomes, including data collection and the utilization of measurement tools. Describe how program staff is involved in the development of CIPs and how staff is instructed/supported to implement them.
<i>Program Volunteers</i>	1	Are volunteers used for program service delivery? <i>(Prompt Default is 'No')</i>	No Prompt Provided
<i>Program Volunteers</i>	Conditional Field for Question 1	If no, explain why. <i>(Max. 150 words)</i>	No Prompt Provided
<i>Program Volunteers</i>	Conditional Field for Question 1	If yes, how are volunteers recruited and in what capacity are they used within the program? <i>(Max. 150 words)</i>	No Prompt Provided
<i>Client Feedback</i>	1	Does the program use a standardized questionnaire (i.e. - surveys, mailings, follow-up phone calls, etc.) to collect individualized client feedback? <i>(Prompt Default is 'Yes')</i>	No Prompt Provided
<i>Client Feedback</i>	Conditional Field for Question 1	If yes, how many questionnaires were distributed in the first 6 months of the program?	No Prompt Provided
<i>Client Feedback</i>	Conditional Field for Question 1	How many questionnaires were collected/returned?	No Prompt Provided
<i>Client Feedback</i>	Conditional Field for Question 1	What was the response rate? (Number collected divided by the number distributed)	No Prompt Provided

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<i>Client Feedback</i>	Conditional Field for Question 1	If not, describe how client feedback is collected, tracked, and measured.	No Prompt Provided
<i>Client Feedback</i>	2	Describe how the collected client feedback is representative of the total number of Outputs served during the first 6 months of the program. <i>(Max. 150 words)</i>	<u>Instructions for Question 2</u> - Ensure the number of Outputs served in the first 6 months of the program is included in the response.
<i>Client Feedback</i>	3	Describe who reviews the feedback received. If applicable, provide an example of how client feedback received in the first 6 months of the program resulted in a service revision and/or program improvement. <i>(Max. 150 words)</i>	No Prompt Provided
<i>Executive Leadership Engagement</i>	1	Has the CEO/Executive Leadership observed programming within the first 6 months? <i>(Prompt Default is 'No')</i>	No Prompt Provided
<i>Executive Leadership Engagement</i>	Conditional Field for Question 1	If yes, indicate when and how often program observations occurred. <i>(Max. 150 words)</i>	No Prompt Provided
<i>Executive Leadership Engagement</i>	Conditional Field for Question 1	Based upon the program observations made, what were the actions taken by the CEO/Executive Leadership regarding staff development, program service delivery, measurement tools, and/or continuous improvement? <i>(Max. 150 words)</i>	No Prompt Provided
<i>Executive Leadership Engagement</i>	2	What plans are in place to ensure continuous program service delivery in the event of a CEO/Executive Leadership change? <i>(Max. 150 words)</i>	<u>Instructions for Question 2</u> - Describe "how deep is the bench" for the agency. Include examples of formalized succession planning, internal staff development, recruitment strategies, and/or Board involvement.

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<i>Diversity and Inclusion Efforts</i>	1	Describe efforts made related to diversity of staff hired to be reflective of the client population to be served. <i>(Max. 150 words)</i>	<u>Instructions for Question 1</u> - Diversity efforts could include, but are not limited to, race, ethnicity, cultural, gender, sexual orientation, age and/or lived experience.
<i>Diversity and Inclusion Efforts</i>	2	Describe efforts made related to diversity of Board members recruited to be reflective of the agency's mission and/or client population to be served. <i>(Max. 150 words)</i>	<u>Instructions for Question 2</u> - Diversity efforts could include, but are not limited to, race, ethnicity, cultural, gender, sexual orientation, age and/or lived experience.
<i>Diversity and Inclusion Efforts</i>	3	Describe efforts made related to inclusion of staff hired and Board members recruited to ensure representation of perspectives and abilities. <i>(Max. 150 words)</i>	<u>Instructions for Question 3</u> - Inclusion efforts seek to make each person in an organization feel welcomed, respected, supported, and valued as a team member.
<p><b>No Separate Narrative Questions or Prompts provided for the following Application Sections: Indicators (HOIUW Benchmarks), Program Activities and Outputs, Continuous Improvement Plans and Program Budget and Year-To-Date Actuals.</b></p>			