
Annual Program Activity Report Guide Reporting on 2016

Please use the questions below as a guide in filling out your program's online activity report for 2016 (due March 31, 2017). **This guide cannot be used to submit information, you must use the online form found on www.unitedcharitable.org**

I. Program & Contact Information

- Program Name
- Program Account Number
- Field of Interest: (choose one)

Animal Welfare	Education Emergency	Legal/Civil Rights
Arts & Culture	Assistance	Ministry
Children/Youth	Environment	Veterans/Military
Community Development	Family Services	Service Women's Issues
Disabilities	Health	
- Program Manager Email Address
- Program Address
- Is the contact information provided different from past filings?

II. Progress & Results

- Describe the progress made in 2016 toward the goals and objectives of your program.
- Detail your program's activities and services (i.e. who you have helped and what help was provided)
- Detail your program's fundraisers, seminars, workshops and events (i.e. what events, seminars or workshops has your program held and please include the dates of each event)
- Has your program applied for grant funding?
- If yes, please list the grants your program has applied for and indicate whether the grant was awarded. If you did not submit these grant proposals or applications to United Charitable for review and approval, please attach them below.
- Do you plan on applying for grant funding in 2017?
- Does your program have volunteers, staff, or other individuals that come in direct contact with children, the elderly and/or persons with disabilities in need of support (including you as the program manager)?
- Does your program use non-hired or personal cars, buses or vans to transport program volunteers, supplies or participants?
- Does your program give or plan to give scholarships?
- Does your program give or plan to give grants to individuals?
- If your program is a ministry, does it provide a housing allowance to ministers?
- Does your program provide any counseling, coaching, testing or medical/clinical services?

III. Successes & Challenges

- Describe the significant successes and challenges your program has experienced this past year.
- Please provide numbers (or estimates) for the following:

Number of Volunteers
Number of Hours Volunteers Worked
Number of Events (or seminars or workshops)
Number of Attendees at Program Events

Number of People Who have Used Program Services
Number of Participants in Program Activities
Number of Fundraisers

III. Future Plans

- Describe any changes to program activities that will be made based upon the past year's challenges, successes and results.
- Describe any future planned events, services, fundraisers, activities, etc.

IV. Additional Information

- Please share anything else that happened during 2015 that has impacted your program, either positively or negatively (optional).
- Did you create any promotional, supplemental or marketing materials this past year? If yes, please attach them below.

V. Employees (Please skip if your program does not have employees)

United Charitable implemented a new Performance Management system in 2015. We created our 5-year strategic objectives, as well as shorter term interim goals for 2015, in order to reach these objectives. As a Program Manager, your program's mission and your employees' individual goals are critical to meeting United Charitable's strategic objectives. (We will include space in next year's Annual Report, asking you to assess and report on these individual goals. Were they met? If so, describe. If not, why not?) We would like to ask you to think about goals for yourself and each of your employees for 2015 and include them in Section V of this year's Annual Activity Report. Talk to your employees and collaborate on what you both think they should be for this year. You are asked to check in regularly with your employees during the year to assess whether the goals you set are realistic and achievable, or if new and unexpected work was added to your program, and the goals need to be tweaked. In any case, you will be asked to report on those goals next year. There are no right or wrong answers. It's simply a monitoring system. We expect that this structure will help keep United Charitable on track for living up to our overall mission statement, "To make philanthropy accessible to people wanting to make a difference by providing comprehensive management of charitable programs and donor-advised foundations on a community, national, or global level."

- Please list all payroll employees (including yourself).
- Please list 2-3 personal goals for each employee which are relevant to and will support the overall goals for your program in 2016.
- Please report on each employee's progress in relation to their 2-3 personal goals for 2016, as reported in last year's activity report submission.