#RISEUNITEDQC

Funded Partner Quarterly Outcomes Reporting

Clear Impact Instructions

Introduction

The data you share with us through quarterly Clear Impact reports is vital to our work at United Way Quad Cities. These reports are evaluated quarterly by United Way staff and UWQC's Impact Council to determine what is working well for you as one of our funded partners, what barriers you're experiencing, and how UWQC can better support your efforts. The demographics data is also critical to ensuring that we, through our collective work, are serving our community's most vulnerable and marginalized populations. Finally, the reports help demonstrate to donors the impact of our work, influencing them to continue contributing to the Community Impact Fund that makes our investments possible. The insights you share with us through these reports are invaluable. Thank you!

Quarterly report schedule (approximate):*

Report	Quarter Timeframe	Report Due (est.)
Interim	July - December	January 15
Final	January - June	July 15

*If the due date falls on a weekend, the report will be due the Friday prior to the due date

Things to keep in mind:

- A Clear Impact scorecard needs to be completed for EACH of the outcomes you receive funding for.
  - *For example,* if you are funded under Education 1: Strong Start and Health 1: Health Promotion, you will have 1 scorecard to complete for Strong Start and 1 scorecard to complete for Health Promotion.
- United Way's fiscal year runs from July 1 through June 30.
- There are 3 steps for each report:
  (1) Graph Data
  (2) Narrative Questions
  (3) Demographics Spreadsheet

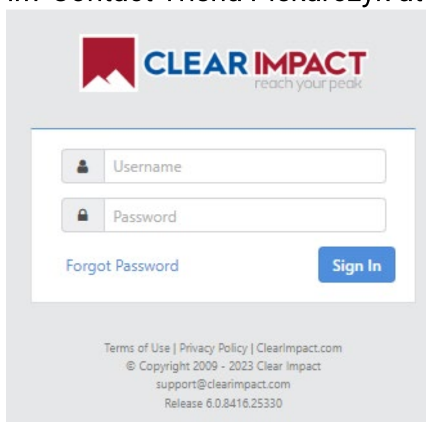
Getting Started

1. Link to Clear Impact: https://app.resultsscorecard.com

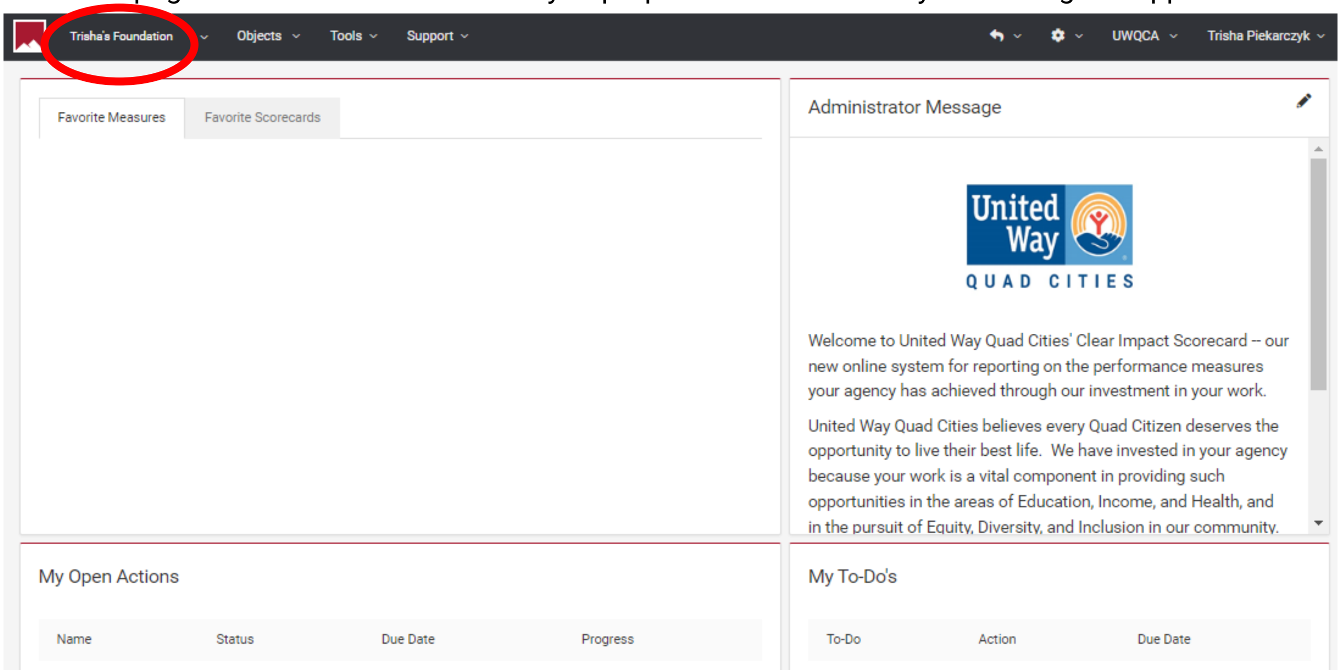
2. Enter your Username and Password on this screen and click “Sign In” to login.

   Forgot your password? Click on “Forgot Password” for instructions to reset your password.

   Having issues getting in? Contact Trisha Piekarczyk at trisha@unitedwayqc.org



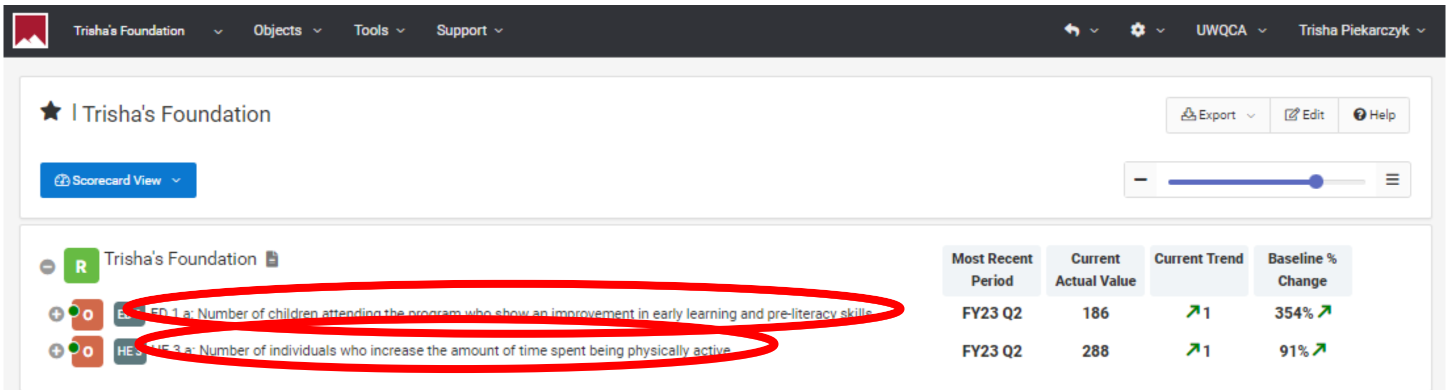
3. Once you login, you will be taken to the Clear Impact home page. In the upper left-hand corner, you will see your agency’s name next to the Clear Impact logo. This is a link. Click on it to get to the page that lists which outcomes you proposed to measure in your initial grant application.



4. Clicking on your organization’s name in the upper-left hand will take you to this screen. Here, you will see your outcomes listed. You have to complete a scorecard for EACH of the outcomes you

received funding for. To get to each outcome's scorecard, click on the TEXT of each outcome as circled in red in the screenshot below.

Example: Trisha's Foundation is funded under 2 outcomes, so Trisha's Foundation will complete 1 scorecard for ED 1a and 1 scorecard for HE 3a.



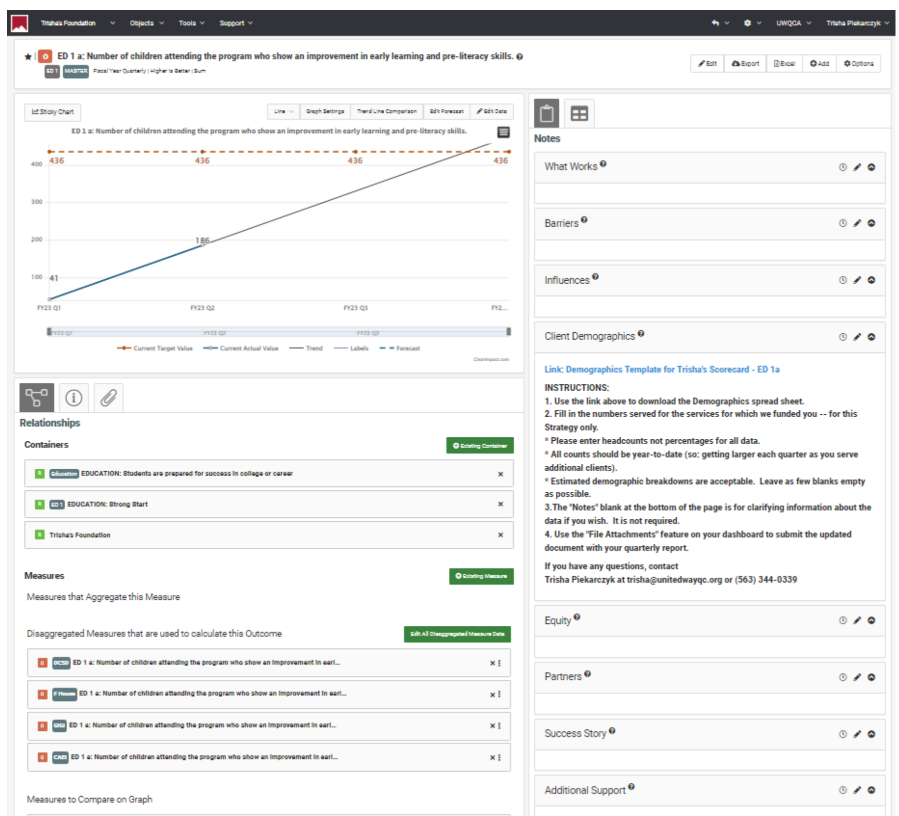
5. Your scorecard should look something like this:

   Once you get to the scorecard for your outcome, you will follow 3 steps for each outcome to complete your report(s)

   STEP 1: Enter Graph Data

   STEP 2: Narrative Questions

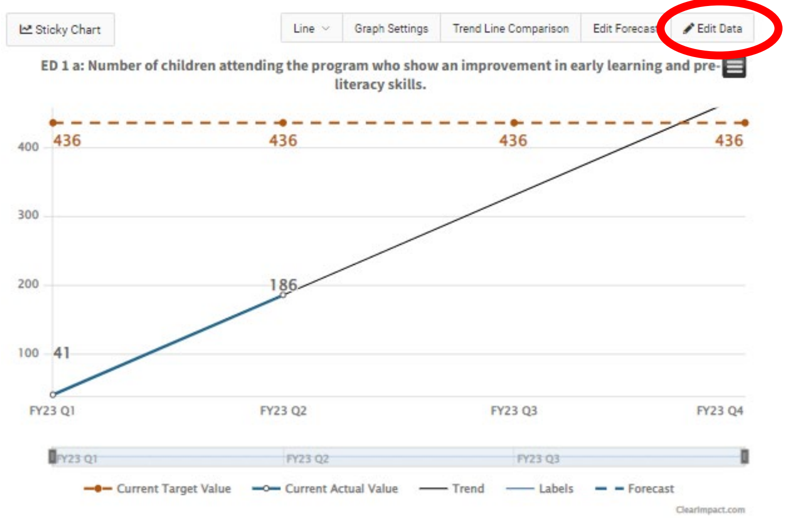
   STEP 3: Client Demographics



<u>STEP 1: Enter Graph Data</u>

6. In the upper left-hand corner of your scorecard, you will see your graph that charts your progress toward the goal you set in your original application. On the graph, this target is denoted by the dotted red line.

   To add data to your graph, start by clicking on the "Edit Data" button.



7. From here, you will see a data table containing numbers that have already been entered by your agency in the past as well as the target value for what you said your goal would be when you initially submitted your grant application. In this data table, fill in ONLY the "ACTUAL VALUE" column for the quarter you're reporting on.

	Start Date	Time Period	Actual Value	Target Value	Comment	Baseline
1	4/1/2023	FY23 Q4		436		
2	1/1/2023	FY23 Q3		436		
3	10/1/2022	FY23 Q2	186	436		
4	7/1/2022	FY23 Q1	41	436		
5	4/1/2022	FY22 Q4				
6	1/1/2022	FY22 Q3				

This is the goal your agency set when you applied. Do not change this.

This tells you when the quarter in the "Time Period" column starts.

This tells you the time period you are reporting on.

Fill this in for the quarter you're reporting on!

- This is the # of people who met your outcome so far *this year.*
- Numbers reported on the graph are *cumulative.*

  For example: at Trisha's Foundation, 41 kids improved their literacy skills in Q1. 145 kids improved their literacy skills in Q2. Therefore, I enter 186 for the Q2 value (41 in Q1 + 145 in Q2).

> **<u>IMPORTANT:</u>** For each report, your "Actual Value" number is **year-to-date.** That means for Q2, you report the number of new outcomes reached *plus* the number you entered in Q1. For Q3, you enter Q3 + Q2 + Q1. For Q4, you enter the total number of outcomes achieved throughout the entire year (July 1 – June 30).

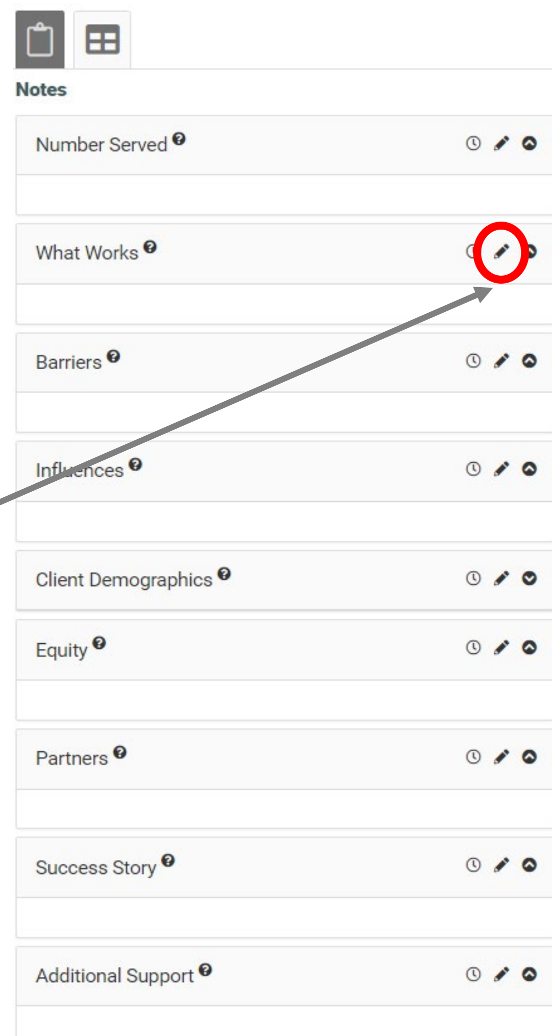
Once you are done entering data into the graph, click on the green save button in the upper right-hand corner of the graph box.

<u>STEP TWO: Narrative Questions</u>

8. On the right-hand side of your scorecard, you will see a box for each of the Narrative Questions. The Narrative Questions are called "Notes" in Clear Impact. There are 8 Narrative Questions that need responses:
   (1) Number Served
   (2) What Works
   (3) Barriers
   (4) Influences
   (5) Equity
   (6) Partners
   (7) Success Stories
   (8) Additional Support

   To add content to each Note, click on the pencil icon next to each Note header.

   Type your response in the text box that pops up, then hit the green "Save" button in the upper right-hand corner near the Note header.



Tips:

- Clicking on the question mark next to each note header will tell you what each question is asking for. This is also listed on the next page.
- Clicking on the clock icon will show you all of the answers that were previously entered for this note. After clicking the clock, you can click "view" next to each note to see it and then "restore" to bring that answer back into the text box.

Here are the questions you will need to answer:

(1) Number Served: Since July 1, 2022, how many people were served by the services funded by UWQC within this strategy only?

(2) What Works: Please write briefly about what has been working well at your organization to address this strategy over the past three months. Include any key highlights from the services you provided.

(3) Barriers: What barriers – long-standing or emerging – do you and other service agencies addressing this strategy face? What challenges have prevented you and other providers from circumventing these barriers to service?

(4) Influences: In the past three months, has anything changed about how you administer your services that address this Strategy? Has anything changed in terms of the community need that your services address?

(5) Equity: In what ways is your organization working to ensure that your services are provided equitably to all Quad Citizens. What steps have you taken to diversify your organization's staff, clients, volunteer base, and/or board of directors?

(6) Partners: Please share a list of those organizations you have partnered with to help you implement your strategy and the contribution each partner makes to your work.

(7) Success Story: Please share a personal story about the impact of your Strategy on someone who participated in your services or programs. Stories that include photos or videos tend to show the most impact - please consider uploading 1 or more photos. For any success stories in formats you cannot submit through the Clear Impact system, please email them directly to trisha@unitedwayqc.org.

(8) Additional Support: Are there ways, other than funding, that United Way could provide additional support for your organization? (For example: volunteer engagement, community and corporate partnerships, advocacy, professional development opportunities for staff)

Don't forget to hit save after entering text into each text box.

Save

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QUAD CITIES

STEP THREE: Client Demographics

9. The Client Demographics note *does not* require a narrative answer. Instead, download the Excel spreadsheet linked at the top of the Client Demographics note. Click on this blue link, and the template will download onto your computer.

Client Demographics

Link: Demographics Template for Trisha's Scorecard - ED 1a

INSTRUCTIONS:
1. Use the link above to download the Demographics spread sheet.
2. Fill in the numbers served for the services for which we funded you -- for this Strategy only.
*** Please enter headcounts not percentages for all data.**
*** All counts should be year-to-date (so: getting larger each quarter as you serve additional clients).**
*** Estimated demographic breakdowns are acceptable. Leave as few blanks empty as possible.**
3.The "Notes" blank at the bottom of the page is for clarifying information about the data if you wish. It is not required.
4. Use the "File Attachments" feature on your dashboard to submit the updated document with your quarterly report.

If you have any questions, contact
Trisha Piekarczyk at trisha@unitedwayqc.org or (563) 344-0339

When you open your Excel template, it will look something like this. Each quarter, you will enter the demographics of the clients *who achieved your outcome* in the row for the quarter you're reporting on. Numbers should be cumulative (year-to-date)

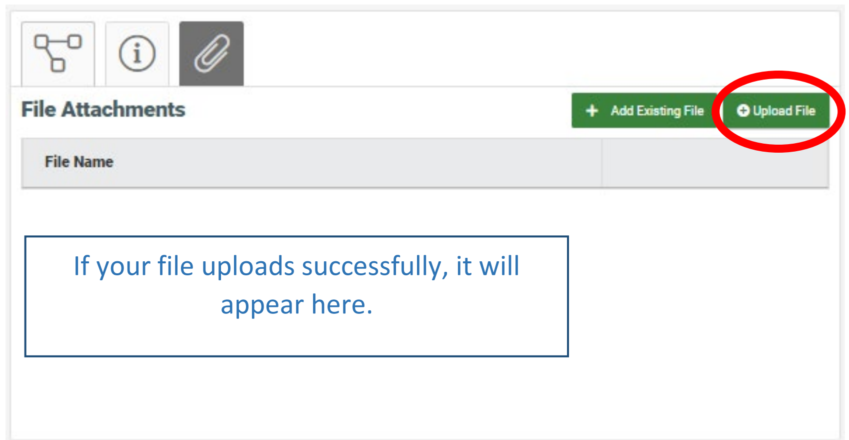
Education Strategy 1	AGE						GENDER				RACE							ETHN	COUNTY		INCOME		
	0-5	6-12	13-18	19-30	31-54	55+	M	F	Other	Un-known	White	Afr Am	Nat Am	Asian	Multi	Other	Un-known	Hisp	RI	Scott	Low	Mid	High
Q1 (Jul - Sep)																							
Q1-Q2 (Jul-Dec)																							
Q1-Q3 (Jul-Mar)																							
Full Year (Jul-Jun)																							

IMPORTANT

- Just as with the Graph Data in Step One, all demographic data should be year-to-date.
  For example, if you are completing your Q2 report, you will fill in the "Q1-Q2 (Jul-Dec)" row for all clients who achieved your outcome in Q1 + clients in Q2.
- Estimated demographic breakdowns are acceptable. Try to leave as few blanks as possible.
- You will have on of these Demographic Spreadsheets for EACH outcome you receive funding for. On each sheet, report ONLY the numbers for that outcome.

10. Save the completed Excel Demographics template onto your computer, and then re-upload it into Clear Impact. To re-upload the spreadsheet, click on the paper clip icon in the bottom left-hand corner of your scorecard underneath the graph to get to the File Attachments section.

Next, click the "Upload File" button. Your file browser will pop up. Double click on the Excel Demographics template that you just filled out to upload it back into Clear Impact.



After it uploads to Clear Impact successfully, the file will appear underneath the "File Name" in the File Attachments section.

There is no save button for the File Attachments section.

11. Once you have completed all 3 steps (Graph Data, Narrative Questions, and Demographics Spreadsheet), you are done! There is no "submit" button – whatever has been entered in Clear Impact at the time of the deadline will be considered your finished report.

If you have any questions or need support navigating Clear Impact, please contact Trisha Piekarczyk at Trisha@unitedwayqc.org.