



United Thank Offering Grant Reporting Process

Note: all this information and the links are also available at www.unitedthankoffering.com/grant-reporting/. Every grant that UTO awards comes from the generous donations and thank offerings of Episcopalians throughout the church and the Anglican Communion. One of the ways we continue to increase giving to UTO, so that we might fund additional grants, is by sharing the stories of UTO grant sites as their project progresses over the year. You will be reminded a few weeks prior to the deadline of all these reports, but please put them on your calendar now to avoid any conflicts. You can always turn reports in early if needed. For your grant to be closed, you must submit the reports outlined on this form. Your diocese/province will not be eligible to receive additional funding from UTO until prior grant awards are officially closed.

A reminder about UTO funds: you will need to account for the totality of the amount awarded with proper invoices and receipts. These items will be checked against your submitted budget and the granting criteria under which your grant was awarded. You cannot spend UTO funds on items which do not fit within the categories on your budget or for items that are listed as out of criteria, nor can you deviate from the project outlined in the application. If you are unsure about any expense, please contact Heather Melton at hmelton@episcopalchurch.org prior to spending money to ensure that it will be accepted. She can also assist you in determining what your budget categories are if that is unclear to you or provide you with a copy of the Focus and Criteria for your grant award if you need one.

Initial Report – within 60 days of the award

As soon as you are awarded a UTO grant, there are three things you need to complete:

1. Initial reports are due via formstack: https://DFMS.formstack.com/forms/uto_initial_report_25
2. Submit a press release to either your local paper or diocesan newsletter. Then email a copy to the UTO staff for your files.
3. Update your website to showcase that you've received a UTO grant and include the UTO logo. You can get the logo from www.unitedthankoffering.org or email the staff. You will then need to send a screenshot of the update to include in your file.
4. Once your grant is paid out, you will need to complete and return to the Finance Department the form acknowledging that the funds were received.

Mid-Year Report – 6 months from the award date

Mid-year reports are due via formstack: https://DFMS.formstack.com/forms/uto_grant_midyear_report. This is a basic check in on how your project is going and to let us know if you anticipate any challenges in completing your project within the timeframe remaining. You will need to upload images of your project so far along with a narrative that we can use in promotional materials.

Extension Requests – 9 months from the award date

If you are unable to complete your project within the year it was awarded, you can apply for up to an additional year of time to complete your project. Please note: you must demonstrate within the form how more time will allow you to complete the project as outlined in your original application and budget. Extension request should be due to delays in starting or hiring not because you are changing your project. You will need to fill out the form here: https://DFMS.formstack.com/forms/uto_extension The deadline to fill out your extension request is firm and late requests will not be considered so please plan accordingly. You can fill this out as soon as six months from the award date. You will need to provide receipts for any funds spent so far and a plan on how you will spend the remaining funds so we can ensure you are on track with the audit standards for UTO Grants. (See note at the top.)

Final Report – One year from the award date

Your final report must be submitted to formstack one year from the award date:

https://DFMS.formstack.com/forms/uto_final_report Please note that it requires several sections and forms as outlined here.

Narrative Report Requirements

1. Please answer the questions on the form about how the grant was experienced in your community. Responses should be at least 200 words in length per question.
2. Submit quotes from community leaders.
3. Please upload high resolution photos. Do not imbed them in a word document.
4. If you created a video as a part of your project, please submit that to UTO as well. (Please make sure that you acknowledge UTO in the video.)

Financial Report Requirements

Please note that you will need to account for the totality of the amount awarded with proper invoices and receipts. **These items will be checked against your submitted budget and the granting criteria under which your grant was awarded.**

1. Please fill out and sign the Final Grant Accounting Form prior to uploading it to Formstack.
2. If there are unused funds, please return them to:
United Thank Offering
DFMS – Protestant Episcopal Church US
P.O. Box 958983
St. Louis, MO 63195-8983
With your grant number in the memo line and copy of the Final Grant Accounting form. You can also request information to wire the funds back to UTO from Heather.
3. Gather the receipts and scan them into one document. Make notations on the paper with the receipt if needed.
 - a. Per the UTO Grant Criteria, you cannot submit receipts for things not on your original budget, nor can you submit receipts for things not funded under the UTO Criteria or removed from your budget by the UTO Board's partial grant award. **If you are uncertain about an expense, please contact Heather prior to making the expenditure for guidance.**
 - i. UTO will **not** accept:
 1. Shipping costs;
 2. Bids without final invoices;
 3. Uncanceled checks;
 4. Items not shown on an invoice or bill;
 5. **Invoices, bills, ledgers, etcetera from before the grant check was issued.**
 - b. UTO will only accept a payroll ledger, showing the salary, benefits, etcetera, for any grants that support staffing expenses. Remember, UTO only funds the base salary, so make sure this is obvious on the ledger to expedite the auditing process.
 - c. You can submit more paperwork than the amount of the grant award if the total project was more than what was funded, however, you are only required to account for how UTO funds were spent.
4. If you are asked to submit additional information to clarify an invoice or ledger, the additional information cannot conflict with previously submitted information.
5. Everything you submit becomes a part of the permanent record and cannot be returned. Please keep all original receipts and invoices.
6. **If your grant receipts include non-USD amounts**, please include something that shows the date and the exchange rate. This can be as simple as a screenshot of the currency exchange calculator on google. We've also created a spreadsheet to help outline your receipts and the exchange rate. [You can download the spreadsheet here.](#)