

NSORG Lunch & Learn: Performance Reporting

April 17, 2024

Agenda

- Introductions
- Quarterly Custom Forms
- Annual Report Overview
- Tasks & Due Dates
- AmpliFund Walkthrough
- Q&A

**** NOTE: Everyone who registered for the Lunch & Learn will receive a copy of the slides & meeting recording link. ****

Introductions

Introductions

Economic Development Consultant

- Atticus Stansbury

Program Managers

- Mike Vlassakis

Business Managers

- Elizabeth Blanco Rodriguez
 - South Omaha
- Daren Waters
 - North Omaha
- Abra Kataka
 - Greater Nebraska

NSORG Contract Update

- As of April 17th, 2024:
 - 42 NSORG contracts are executed
 - 32 NSORG contracts are pending signature
 - 56 NSORG contracts are being drafted
 - 10-15 new contracts should be issued each week

Monthly Financial Reporting

- Monthly financial reporting was covered in last week's Lunch & Learn Session #3.
<https://youtu.be/NqV-qT1tdtA>
- **Monthly financial reporting** is a requirement for all NSORG awards, as outlined in your grant contract, article 4, section 4.2 "financial reporting."
 - "Recipient agrees to submit monthly financial reports . . . Reports are due on the fifteenth day after the end of the month to be reported.
 - Financial reports shall align with Recipient's proposed budget and shall be supported by appropriate documentation (payroll records, invoices, receipts, etc.)"

Tips for Monthly Financial Reporting

- Do not enter your expenses until you have **documentation** for each expense.
 - Source Documentation (e.g., invoice)
 - Proof of Payment (e.g., cleared check)
- Work on your monthly financial reporting **as you go** so that it is easier at the end of the month.

NEBRASKA

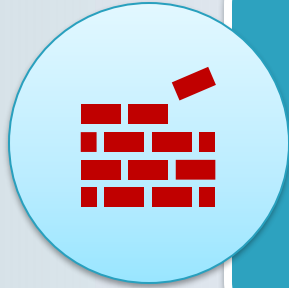
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Requesting
Funds

Financial Reporting
Cycle

Reporting
Expenses

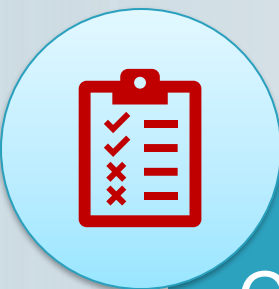
Spending
Funds



**Make Progress
on Scope**



**Performance Reporting
Cycle**



**Complete Task
(reminder) in
AmpliFund**



**Complete
Quarterly/Annual
Custom Form**



Quarterly Custom Forms

- Quarterly performance reporting is a requirement outlined in your grant agreement under article four "recipient reporting," section 4.3 "performance reporting."
 - "Reports are due on the fifteenth day after the end of the corresponding quarter. (the current quarter ends on the 30th of June)"
 - First quarterly report is due **July 15, 2024.**
- To access your NSORG Quarterly Report, navigate to:
 - Amplifund > Grant Management > Active Grants > (click your grant) > "Custom" Tab > **NSORG Quarterly Report** > Click the "+" icon in the top right to create a new report.

NSORG Quarterly Report

- The NSORG Quarterly Report itself tracks the **progress** that you have made towards **achieving the key deliverable items outlined in your scope of service**. DED can aggregate this data to monitor the progress of the NSORG Program.
- The form is an **important tool** that you can use to inform your program manager of **project milestones**, invite DED to **press opportunities**, and request **technical or programmatic assistance** as needed.

Quarterly Report Walkthrough

The screenshot shows the AmpliFund web application interface. The browser address bar displays `ne.amplifund.com/Grants/Grants/Details/32392`. The user is logged in as Leslie Knope. The main navigation bar includes 'Details', 'Analytics', 'Post-Award', 'Tools', and 'Custom'. A dropdown menu is open under 'Custom', listing several report options, with 'NSORG Quarterly Report' highlighted in yellow. The main content area shows 'Award Information and Status' for '(TEST) NSORG Test A'. A table below lists various financial metrics for the grant.

Field	Value
Name	(TEST) NSORG T
Recipient Name	DED Staff Accou
Recipient Award Name	(TEST) NSORG T
Award Status	Approved
Grant-Funded Amount	\$10,000.00
Match Requirement	\$0.00
Total Budget	\$10,000.00
Expenses To Date	\$1,000.00
Match Contributions To Date	\$0.00
Invoiced To Date	\$5,000.00
Pending Invoices	\$5,000.00

Quarterly Report Walkthrough

The screenshot shows a web browser window with the AmpliFund application. The browser's address bar displays the URL: `ne.amplifund.com/Grants/Grants/CustomForms/3239...`. The AmpliFund logo is in the top left, and the user name "Leslie Knope" is in the top right. The navigation menu includes "Details", "Analytics", "Post-Award", "Tools", and "Custom". The main content area is titled "(TEST) NSORG Test Award – NSORG Quarterly Report". Below the title is a message: "Drag a column header and drop it here to group by that column". A table header is visible with columns: "R...", "R...", "R...", "PL...", "El...", "D...", "El...", "D...", "St...", "S...", "S...". The table body contains the text "No records found". At the bottom, there is a pagination control showing "25 items per page" and "0 items".

Tips for Completing Quarterly Custom Forms

- Please be **detailed** in your responses and upload all requested **attachments** so DED will have an accurate understanding of your progress.
- Don't hesitate to request additional support via the report itself.
- If you forget to turn in the quarterly report by the 15th day after the close of a quarter, DED will not be able to approve any subsequent payment requests until you are current on reporting requirements.

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**AMPLIFUND
DEMONSTRATION
OF QUARTERLY
REPORT**

Annual Report Overview

- **One** Annual Custom Form due once a year.
- Form is due by **January 31** for previous year reporting period
 - January 31st, 2025 for year 2024
 - January 31st, 2026 for year 2025
 - January 31st, 2027 for year 2026
 - January 31st, 2028 for year 2027
- **First form is due by January 31, 2025 (for 2024 data)**
- To access your NSORG Annual Report, navigate to:
 - AmpliFund > Grant Management > Active Grants > (click your grant) > "Custom" Tab > **NSORG Annual Report** > Click the "+" icon in the top right to create a new report.

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Annual Report Walkthrough

The screenshot displays the AmpliFund software interface. On the left is a navigation sidebar with icons for Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area shows details for a grant titled '(TEST) NSORG Test A'. A 'Custom' dropdown menu is open, listing several report options: Public Benefits Report, Notification of Annual Audit Form (NAA), State of Nebraska W9 and ACH Enrollment Form, NSORG LB531 Recipient and Project Information, NSORG Annual Report (highlighted with a mouse cursor), NSORG Quarterly Report, and NSORG LB531 - Small Business Support Grant Category - Site Review Form.

Award Information and Status

Name	(TEST) NSORG T
Recipient Name	DED Staff Acco
Recipient Award Name	(TEST) NSORG T
Award Status	Approved
Grant-Funded Amount	\$10,000.00
Match Requirement	\$0.00
Total Budget	\$10,000.00
Expenses To Date	\$1,000.00
Match Contributions To Date	\$0.00
Invoiced To Date	\$5,000.00
Pending Invoices	\$5,000.00
Approved Invoices	\$0.00
Cash Received To Date	\$0.00
Remaining Available Grant-Funded Amount	\$5,000.00
Remaining Match Requirement	\$0.00
Remaining Available Budget	\$5,000.00
Fund Activity Categories	Other

Post-Award Information

Responsible Person: Indre Moore-Kour
<https://ne.amplifund.com/Grants/Grants/CustomForms/322927?formId=1666eab6-9ad2-ee11-85f9-001dd8040188>

Annual Report Walkthrough

Details Analytics Post-Award Tools Custom

Activity
Contacts
Grant Management
Reports
Documents
Knowledge Center
Administration

(TEST) NSORG Test Award – NSORG Annual Report

Drag a column header and drop it here to group by that column

Report Year...	Response - ...	How many j...	Electronic S...	Date Signed	Status	Submitted By	Submitted ...
No records found							

Annual Report Walkthrough

AmpliFundSM Leslie Knope

Activity
Contacts
Grant Management
Reports
Documents
Knowledge Center
Administration

NSORG Annual Report

Instructions

To fulfill reporting requirements, NSORG Recipients must complete an annual report. NSORG Recipients are to submit the applicable and required forms, reports, and/or other materials to DED by January 31 of each year.

Expenses

BEFORE you continue: Have you submitted an NSORG Quarterly Report for each quarter in the past year? If no, do so before submitting this report.*

Yes
 No

Status Report

Select the year covered by this annual report. In most cases, this will be the previous year.

Report Year - Annual Report*

Annual Report #1 - 2024
 Annual Report #2 - 2025
 Annual Report #3 - 2026
 Annual Report #4 - 2027

NSORG Recipient Information

Person Completing Form First Name*

Person Completing Form Last Name*

Person Completing Form Email Address*

NSORG Recipient*

Contract Number*

Project Name*

Annual Report

Annual Report Walkthrough

Certification

I certify that I am the authorized official to submit such information on behalf of the NSORG Recipient, or that I have the authority to execute this form on behalf of the authorized official and can submit proof of such authorization upon request.

Electronic Signature: Please type
First and Last Name*

Electronic Signature*

By checking this box, I agree to the above certification.

Date Signed*

4/17/2024



Form Completion

Are all required questions for the
NSORG Annual Report complete
and ready for submission?*

- Yes
 No

Date of Completion*

4/17/2024



Save as Draft

Submit

Cancel

**AMPLIFUND
DEMONSTRATION
OF ANNUAL
REPORT**

Due Dates

- Each **Budget Reporting Period** is due on the 15th of the following month for the previous month.
 - EX: August Budget Reporting Period is due September 15th.
- Each **Quarterly Report** is due on the 15th day of the end of the previous quarter.
 - Q1 (April 15), Q2 (July 15), Q3 (October 15), Q4 (January 15)
- Each **Annual Report** is due 31 days into the new year.
 - EX: 2024 Annual Report is due January 31st, 2025.




Tasks on AmpliFund




- When your award gets activated in AmpliFund you will receive approximately 20 emails from AmpliFund.
- You must complete the Custom Forms on a timely basis. That includes:
 - W9 & ACH Bank Information (one time)
 - Recipient Information & Project Location Form (one time)
 - 15 NSORG Quarterly Reports
 - 4 NSORG Annual Reports
- Each custom form has a corresponding **task**/reminder.
 - Each task generates automatic email reminders.




Tips for Tasks




- <https://dednebraska.zendesk.com/hc/en-us/articles/13449391683739-Completing-Tasks>



Actions
  

<input checked="" type="checkbox"/> Select All	Name	Responsible Individual
<input checked="" type="checkbox"/>	Performance Tracking Period Due - DED Demo	   John Doe

Actions
  

<input type="checkbox"/> Select All	Name	Responsible Individual
<input type="checkbox"/>	Performance Tracking Period Due - DED Demo	   John Doe

DEMONSTRATION OF TASK COMPLETION

Resources for Awardees

Resources for Awardees

Program
Manager

Zendesk

AmpliFund
support

NAM
Trainings

Lunch &
Learns

Office
Hours

Submitted Questions

- Is there something we share with you that we can't share with others?
- What if I finish my grant early? Do I still have to do reports until 2027?

Questions?