Austin Public Health

PREVENT. PROMOTE. PROTECT.

Completing the Agency Administration Profile* in PartnerGrants

Introduction: The following details provide the documents to gather to complete the

AGENCY ADMINISTRATIVE PROFILE* REQUIREMENTS

Due concurrently with Financial Audit

Agency Administration Information - Requires agency to answer all questions.

i. Calendar Year of AAP: (Actual Year of the report due)

ii. Agency's Current FY Start Date: mm/dd/yyyy
Agency's Current FY End Date: mm/dd/yyyy
Agency's Current FY Ending: YYYY (Year agency's current fiscal year ends)

iii. Do financial policies and procedures outline internal controls including separation of duties, accounts receivable, accounts payable, investments, reconciliations, and classification of accounts? YES/ NO

iv. The agency has written personnel and operating policies? YES/ NO

v. Number of paid full and part-time staff

vi. Briefly describe how the board, staff, and volunteers reflect the community the agency serves

vii. Briefly describe how volunteers are utilized to enhance operations or service delivery

viii. Total number of volunteers utilized during the agency's last fiscal year

ix. Predicted IRS Tax Year Reported (Year Agency's Current Fiscal Year Ends Above Minus 1)
- Most Recent IRS Tax Year Reported: YYYY
- Do Predicted Tax Year Reported and Most Recent Tax Year Reported Match? YES/ NO

x. From IRS 990, Part IX, Pg 10, Statement of Functional Expenses
- Total Mngmt and General Expenses (Line 25, Column (C))
- Total Fundraising Expenses (Line 25, Column (D))

From IRS 990, Part VIII, Pg 9, Statement of Revenue
- Total Revenue (Line 12, Column (A) (Must Equal, Pg 1, Line 12))

xi. Fundraising & Admin Percent of Overall Revenues
- Is fundraising and administrative percentage over 25%: YES/ NO
- If percentage is above 25%, please include a brief explanation and a plan for reducing this percentage.

xii. Please briefly describe how participation in community collaborations has been beneficial to the agency, including how it has impacted clients served. Please use specific examples.

Agency Financial Information – Requires agency to answer Yes/No questions, input percentages and answer open-ended questions.

i. Yes/No questions

- 990 forms submitted to the IRS
- Current on payroll taxes
- Received an unqualified audit for the last two years
- Audit Management Letter – no material financial management issues
- Has at least 3 funding sources
- Any one source of funding more than 75% of
- Operating reserves for at least one month
- Audits from the 2 previous fiscal years show agency kept operating expenses within revenues

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ii. Percentages

Enter the percentage of the agency's revenue generated from each source. Total sum must equal 100%.

- o State & Federal Grants
- o City & County Grants/ Contracts
- o Fundraising Revenue
- o United Way
- o Interest and Other
- o Foundation Grants
- o Special Events
- o Contributions & Major Gifts
- o Client Fees
- o Revenue Total (Must = 100%)

iii. Percentages

Please enter the percent of the agency's expenditures in each area. Total sum must equal 100%.

- o Management/ Administrative
- o Fundraising Expense
- o Program
- o Expense Total (Must = 100%)

iv. Other questions

- o Please briefly describe how dollars are used to leverage other funds?
- o How much money will the agency be bringing into the community through leveraging?
- o Please briefly describe and estimate the value of in-kind support the agency receives how dollars are used
- o Please Describe, including sources

Agency Board Member Information
(At least 3 Board Members)

i. Name and Demographic information
ii. Board Term Start and End
iii. Board Member Status
iv. Board Member Position

Agency Branch Office
(1 per Branch Office)

i. Branch Office Name
ii. Branch Office Address
iii. Office Point of Contact
iv. Identify Available Branch Accessibility Options
v. Primary Service
vi. Description of Programs Offered at this locale

Agency Uploaded AAP Attachments – Requires agency to respond to questions and upload documents.

i. Calendar Year of AAP
ii. FYE Budget Actual
iii. Current FY Budget
iv. Most Recent IRS-990
v. IRS 990 Extension Approval (if applicable – Approval from IRS for a requested extension.)
vi. Three most recent Board approved meeting minutes that demonstrates:
- Approval of Budget,
- Discussion of Performance
- Accepting Audit

vii. Organizational Chart
viii. Most Recent Monthly Financial Statements
xi. Next FY Proposed Agency Budget

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Agency AAP Attachment Checklist – Requires agency to certify that all these documents were uploaded. *This should be the last form to be completed.*

i. Agency Intake Updated (Remains Current At All Times)

ii. Agency Administration (Complete One Per Year)

iii. Agency Board Member Information (Complete One for Each Board Member, Per Year)

iv. Agency Branch Office (Complete One for Each Central Texas Area Office, Per Year)

v. Agency Financial Information (Complete One Per Year)

vi. Agency Uploaded AFR Attachments (Complete One Per Year)

vii. All Sections of This Checklist Completed (One Per Year)

Uploaded Document Checklist

i. Most Recent fiscal year end budget and actuals

ii. Current Fiscal Year Budget

iii. Most Recent IRS-990

iv. Board Minutes from last 3 meetings

v. Organizational Chart

vi. Most Recent Monthly Financial Statements

vii. Major Documents (should be uploaded in Agency Intake)

viii. Audit Management Letter

ix. Next Fiscal Year's Proposed Agency Budget (if available)

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APH Austin Public Health

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Purpose: Help the city ensure public funds get spent wisely and that accepted and established nonprofit organizational practices are met.

Deadlines: All non-governmental nonprofit organizations with formal written agreements with the city of Austin must complete an Agency Administration Profile **annually**. Requisite profile forms and documents may be submitted as soon as possible but **no later than 270 days** following the end of your agency's fiscal year end.

Instructions

To create an Agency Administration Profile

1. Login
    a. Using the browser of your choice, type in the URL: **partnergrants.austintexas.gov**
    b. Enter your authorized User ID and Password and login.
    c. From the Main Menu, click on **Funding Opportunities**
    d. Then select the **Agency Administration Profile – Agency IRS Fiscal Year Ended YYYY** containing the agency's fiscal year end for which you are reporting.

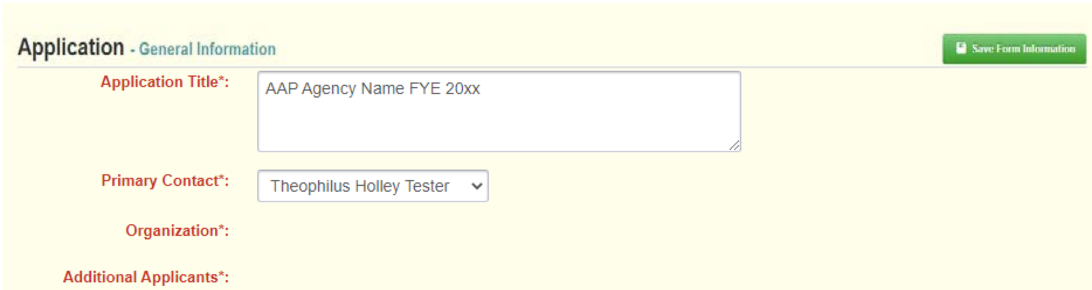
ID	Status	Agency	Program Area	Title	Posted Date	Pre-Application Due Date	Final Application Due Date
13736	Posted		Agency Information	Agency Administration Profile - Agency IRS Fiscal Year Ended 2021 - Contracted Awardees Only - Complete Annually	Oct 4, 2021 1:15 PM	Not Applicable	Not Applicable

    e. Please review the **Funding Opportunity Details** and all associated files and links. These should help your agency prepare its response.
    f. If you have any content related questions, you should contact the designated Program Officer listed under Funding Opportunity Details of this page.

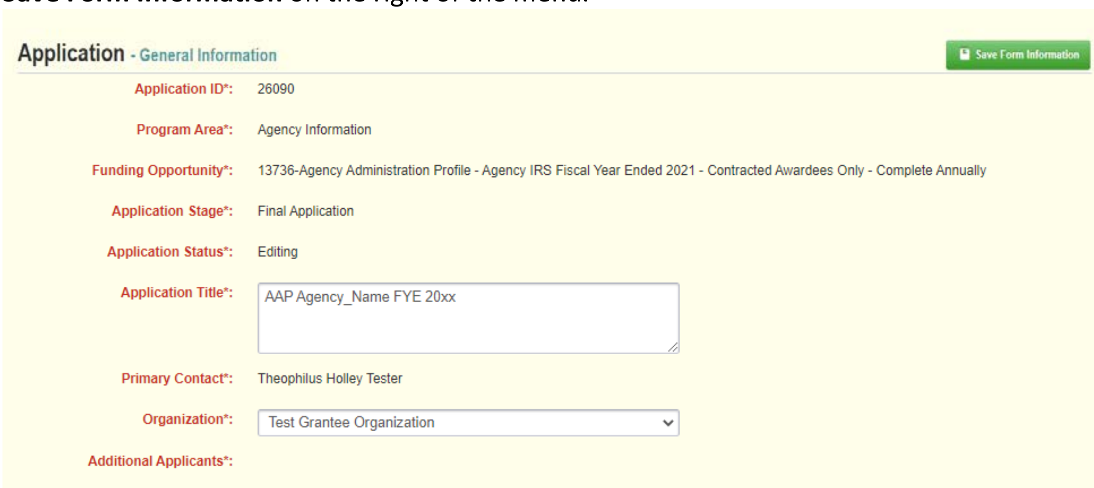
2. Complete an Agency Administration Profile
    a. If you are submitting an Agency Administration Profile for the very first time or would like to start from scratch, you will select **Start New Application**.
    b. If you are returning to complete an Agency Administration Profile that you have already begun, it will appear under **Current Applications** section. From there, you will select your profile's Application Title.
    c. For the purpose of this procedure, click **Start New Application**.

3. **The** Application **Creation is a short wizard** –
    a. If this is your initial entry, you will already be in "Editing" mode; if you are coming back to this, click **Edit Application** on the top right menu of the page.
    b. In the Application **General Information** section, enter the Application Title in the format listed - AAP your Agency's name fiscal year end acronym and its year.
    c. In the Edit screen, your name should appear as the Primary Contact.

d. Click **Save Form Information**.

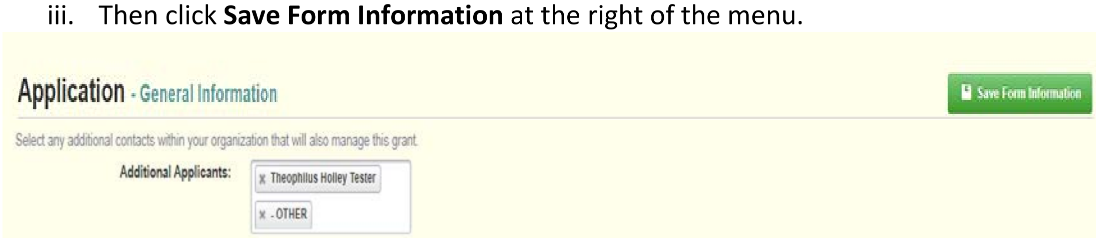


e. The next step in the Application Creation Wizard is to ensure all the information is correct under General Information. In the drop-down box choose the correct Organization's name, then click **Save Form Information** on the right of the menu.



f. In addition to ensuring all the information is correct under the General Information section. The next step is optional. Click in the Additional Applicants field.

i. Select any additional contacts with which you would like to share your Application.
ii. Repeat this action to add multiple contacts.
iii. Then click **Save Form Information** at the right of the menu.



4. Once you return to the previous page, General Information should be marked as complete, as noted by a checkmark under the **Complete?** column next to **Component**.

Component	Complete?
General Information	✓
Agency Administration Profile	
Agency AAP Attachments	

5. The remaining forms, **Agency Administration Profile** and **Agency AAP Attachments** must be marked as complete once you are done with those as well.

6. Next select, **Agency Administration Profile**
   a. If this is your initial entry, you will already be in "Editing" mode. If you are coming back to this, click **Edit Form** at the right of the screen.
   b. Fill out all the fields under **Agency Administration Information**. Then, click **Save Form**.
   c. Click **Edit Form** at the right of the screen, scroll down the screen to **Agency Financial Information**, and fill out all the required fields. Then, click **Save Form**.
   d. Once the sections for Agency Administration Information and Agency Financial Information are complete, scroll down to the bottom of the screen to **Agency Board Member Information**. **Please Note:** A minimum of 3 rows must be entered in the Agency Board Member Information section before you mark the component complete.

      To create a new record, click **+ Add Row**. Complete the required fields then, click **Save Row**. Scroll back down and check your work.

      To edit an existing record you have already started, you will click on the record and make the appropriate edits. Then click **Save Row**.
   e. Scroll back down and check your work.
   f. You will repeat this process for all active agency board members as well as the **Agency Branch Office** section (if applicable).
   g. Once all content has been entered for this form, you will click **Mark as Complete**.

7. This brings you back to the previous page. Click on **Agency AAP Attachments** next.
   a. You will upload all the necessary attachments, as requested in the left-side menu. The attachments preferred are PDF documents. To upload a file, click on the name in the **Named Attachment** column in the left-side menu.
   b. Click **Select File** and find the appropriate file in your computer.
   c. Give a description of what you are uploading, such as "[Agency Name] organizational budget current year 2022" and "[Agency Name] audit FYE 20xx". Then click **Save File**.
   d. Repeat this process for all applicable files.
   e. Once all applicable files have been uploaded, click **Mark as Complete**.

8. This returns you to the previous page. You should see three checkmarks under the **Complete?** column, each next to **General Information, Agency Administration Profile,** and **Agency AAP Attachments**.
    a. To review the details of your Agency Administration Profile, click the blue **Preview Application** button on the right-hand side of the page. Review all the information you are about to submit.
    b. Once you have confirmed the information is correct, click the orange **Submit Application** near the right-hand side.
    c. This action acknowledges that you will no longer be able to edit and that you are sending this on for review.

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