Quarterly Progress Reports

Instructions for Grantees

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Introduction

At the end of each grant quarter, agencies funded by the City of Oakland's Department of Violence Prevention (DVP) are required to submit a QPR to report activities and expenditures from the quarter and request payment.

This document provides instructions for agency staff on how to complete and submit a QPR to the DVP.

Introduction

The QPR is composed of the five sections outlined below.

Item	Purpose
Invoice	Grantee reports their total expenditures for the quarter and identifies the amount they are requesting in payment versus applying to their advance.
Narrative	Grantee reports on program successes, program obstacles, staffing changes, and changes in program operation.
Expenditures	Grantee reports itemized expenditures by budget line item.
Deliverables Report	Grantee uploads a Scope of Work Deliverables Report that reflects their performance for the quarter.
Apricot Links	Grantee links to their site profile and fiscal year budget to their QPR so that agency information auto-populates in the *Invoice* section and budget totals auto-populate in the *Expenditures* section.

Introduction

QPRs are due in the month after the quarter ends. Due dates for each quarter are provided below.

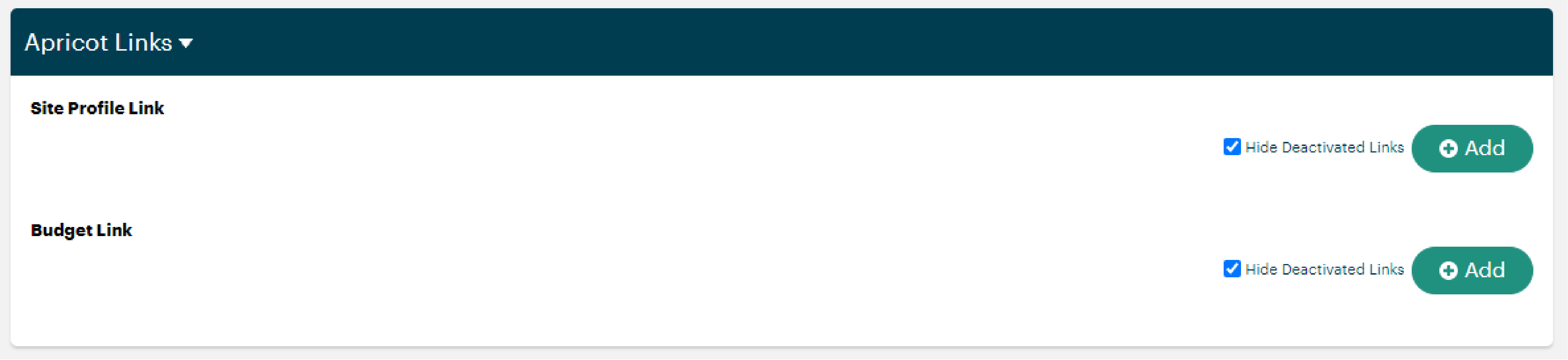
Quarter	Dates of Performance	Date QPR Due
Q1	October 1, 2023 – December 31, 2023	January 31, 2024
Q2	January 1, 2024 – March 31, 2024	April 30, 2024
Q3	April 1, 2024 – June 30, 2024	July 19, 2024
Q4	July 1, 2024 – September 1, 2024	October 31, 2024
Q5	October 1, 2024 – December 31, 2024	January 31, 2025
Q6	January 1, 2025 – March 31, 2025	April 30, 2025
Q7	April 1, 2025 – June 30, 2025	July 18, 2025
Q8	July 1, 2025 – September 1, 2025	October 31, 2025

Preparing a Quarterly Progress Report (QPR)

Apricot Links

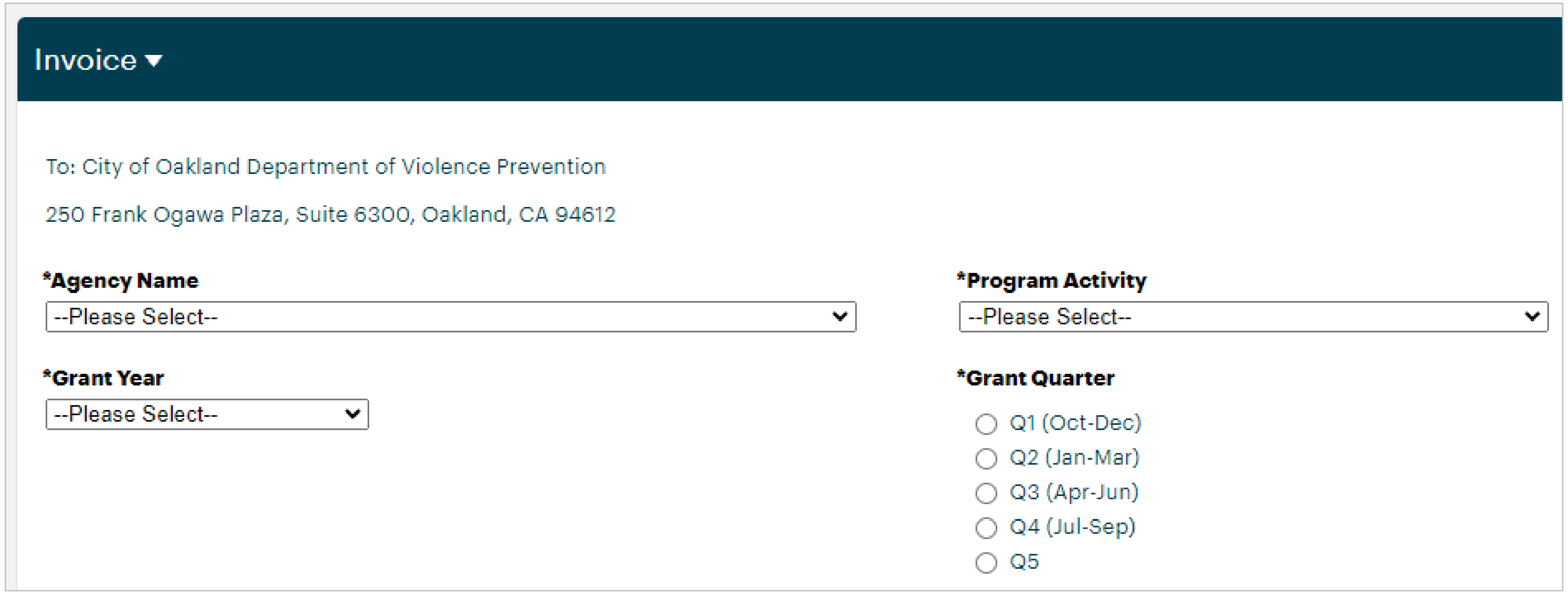
Before completing other sections of the QPR, you should first link the QPR to your agency's site profile and program budget.

Scroll to the bottom of the QPR and find the section called *Apricot Links*. Click the "+ Add" buttons seen below and select your grant from the lists that appear. Be sure to click the "Save" button on the righthand side of the screen after adding the links.



Invoice

To complete the *Invoice* section of the QPR, first select the appropriate options for agency name, program activity, grant year, and grant quarter.



Invoice

To: City of Oakland Department of Violence Prevention

250 Frank Ogawa Plaza, Suite 6300, Oakland, CA 94612

***Agency Name**

--Please Select--

***Program Activity**

--Please Select--

***Grant Year**

--Please Select--

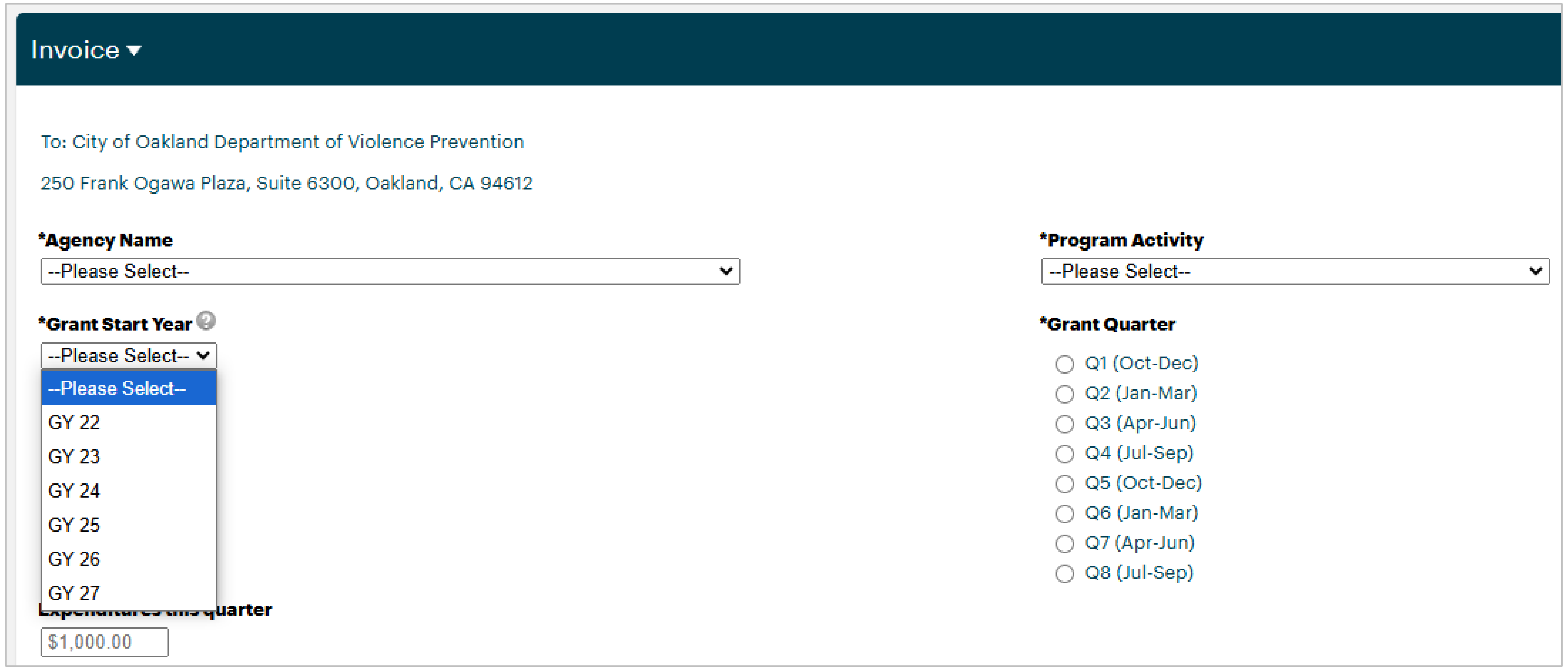
***Grant Quarter**

- Q1 (Oct-Dec)
- Q2 (Jan-Mar)
- Q3 (Apr-Jun)
- Q4 (Jul-Sep)
- Q5

Invoice

To complete the *Invoice* section of the QPR, first select the appropriate options for agency name, program activity, grant start year, and grant quarter.

Note: The DVP's grant year runs from October 1 to September 30. Select the grant year that corresponds to the October 1 start date of your grant.



Invoice

Enter your agency's total program expenditures for the quarter. This should match total expenditures auto-calculated in the "Expenditures" section of the QPR.

Expenditures this quarter

$1,000.00

Amount applied to advance this quarter

$1,000.00

Payment requested

Scheduled payment requested this quarter

$1,000.00

Prior overspent funds requested this quarter

$1,000.00

Prior unspent funds requested this quarter

$1,000.00

Prior withholding requested this quarter

$1,000.00

Invoice

If your agency has an **advance payment**, enter the amount of your current-quarter expenditures that you would like to apply to the advance spenddown.

Please note that your agency must fully spend down its advance payment by the *quarter before the grant ends*. Your agency's remaining advance spenddown should never match or exceed its remaining scheduled payments.

Expenditures this quarter

$1,000.00

Amount applied to advance this quarter

$1,000.00

Payment requested

Scheduled payment requested this quarter

$1,000.00

Prior overspent funds requested this quarter

$1,000.00

Prior unspent funds requested this quarter

$1,000.00

Prior withholding requested this quarter

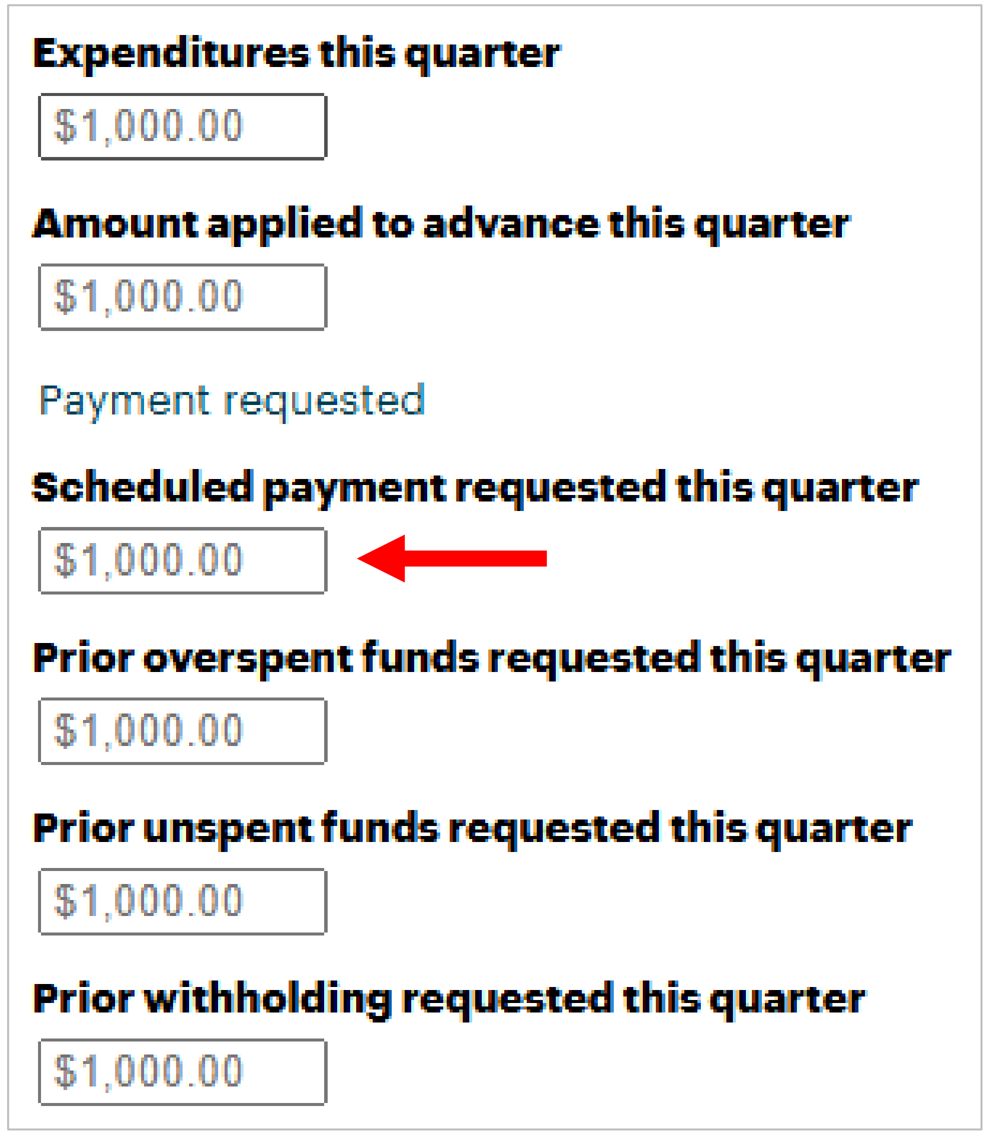
$1,000.00

Invoice

Enter the total amount your agency is requesting for payment based on ***expenditures this quarter***. This amount should not exceed either of the following:

- Expenditures this quarter
- Scheduled payment amount for this quarter

  Note: Your scheduled payment amount can be found in the invoice schedule section of your agency's grant agreement.



Expenditures this quarter
$1,000.00

Amount applied to advance this quarter
$1,000.00

Payment requested

Scheduled payment requested this quarter
$1,000.00

Prior overspent funds requested this quarter
$1,000.00

Prior unspent funds requested this quarter
$1,000.00

Prior withholding requested this quarter
$1,000.00

Invoice

If applicable, enter the amount of **overspent funds** your agency is requesting for reimbursement from a prior quarter.

This request should be made if the following conditions are met:

1. Expenditures this quarter are less than this quarter's scheduled payment amount.

2. Your agency's expenses during a prior quarter exceeded the scheduled payment amount for that quarter.

Expenditures this quarter

$1,000.00

Amount applied to advance this quarter

$1,000.00

Payment requested

Scheduled payment requested this quarter

$1,000.00

Prior overspent funds requested this quarter

$1,000.00

Prior unspent funds requested this quarter

$1,000.00

Prior withholding requested this quarter

$1,000.00

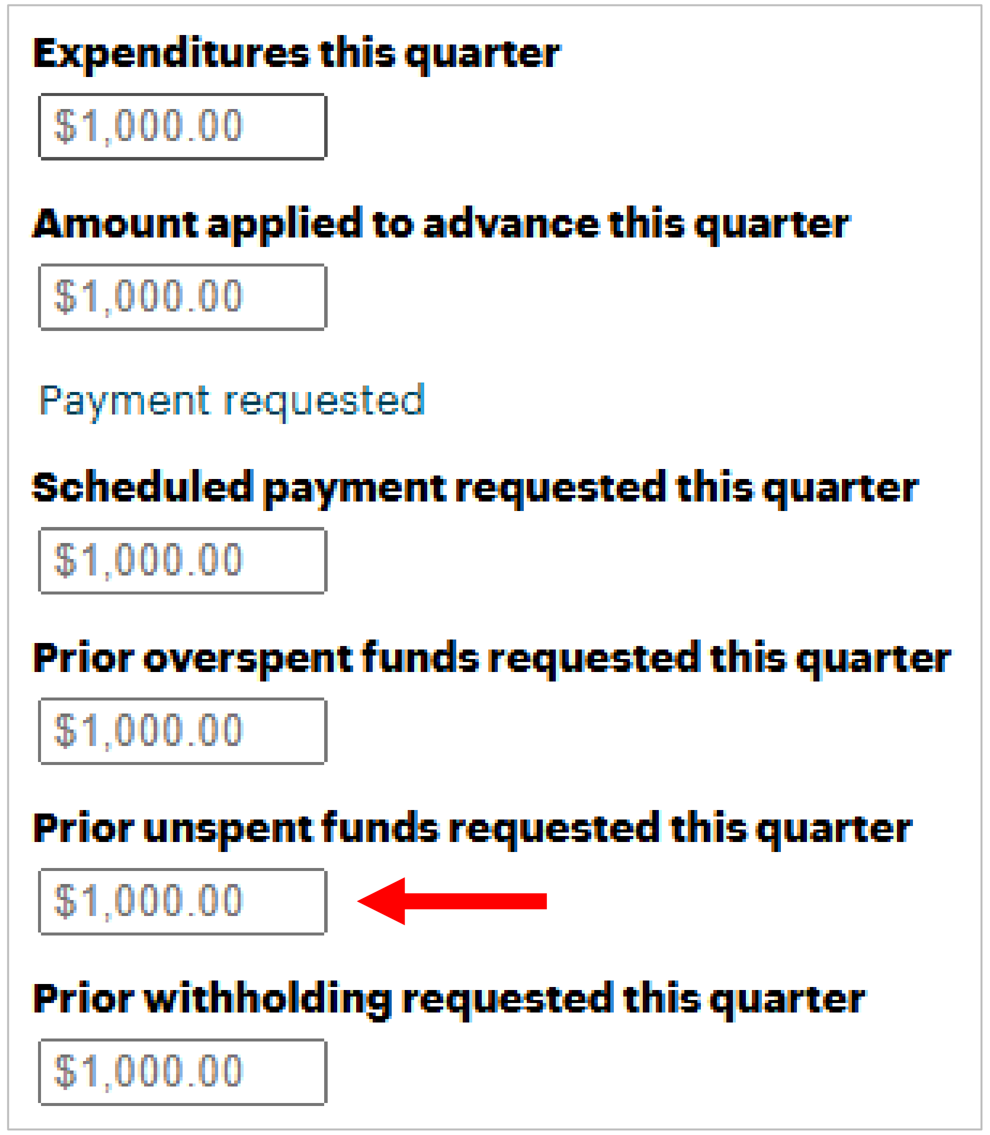
Invoice

If applicable, enter the amount of **unspent funds** your agency is requesting for reimbursement from a prior quarter.

This request should be made if the following conditions are met:

1. Expenditures this quarter exceed this quarter's scheduled payment amount plus the amount applied to the advance.

2. Your agency did not request the full scheduled payment amount in a prior quarter or quarters.



Expenditures this quarter

$1,000.00

Amount applied to advance this quarter

$1,000.00

Payment requested

Scheduled payment requested this quarter

$1,000.00

Prior overspent funds requested this quarter

$1,000.00

Prior unspent funds requested this quarter

$1,000.00

Prior withholding requested this quarter

$1,000.00

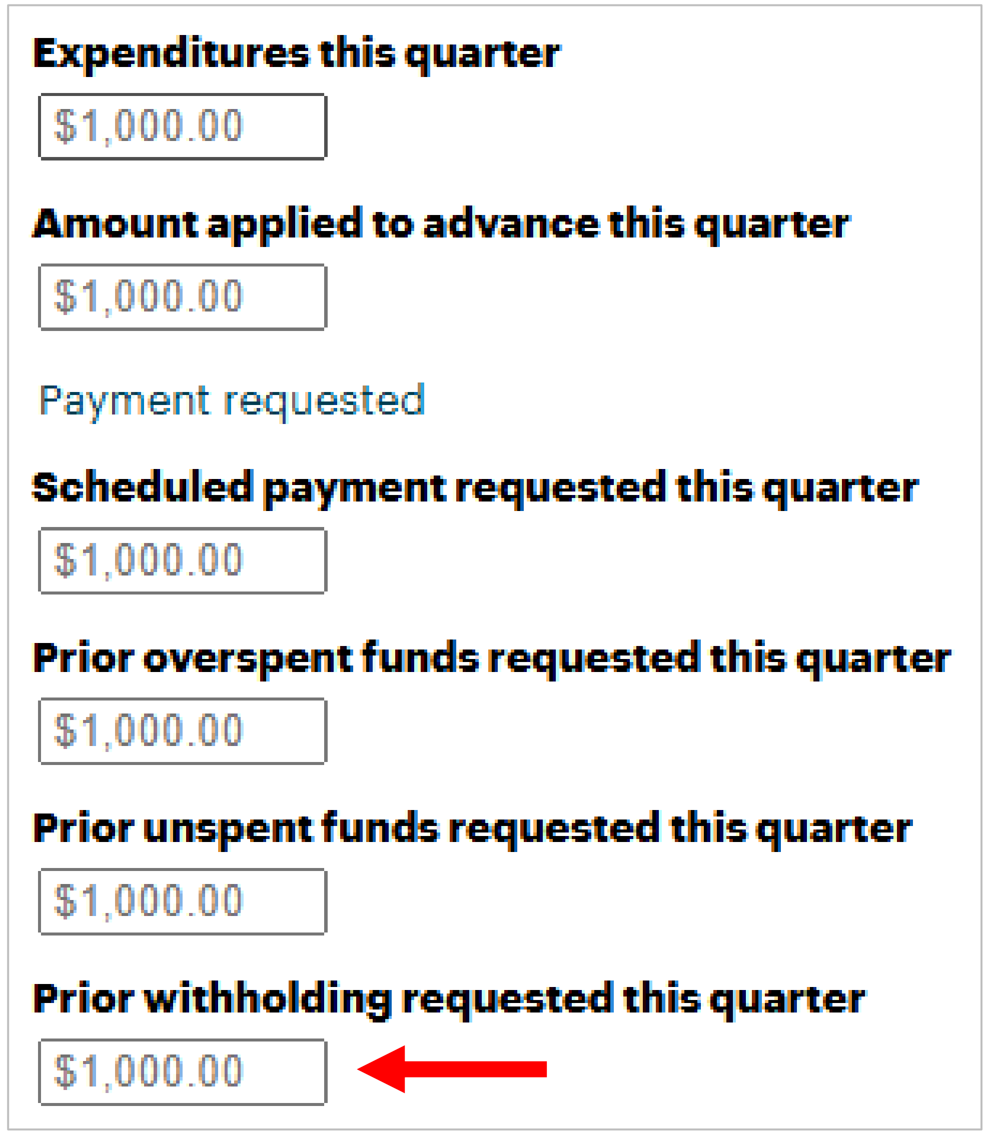
Invoice

If applicable, enter the amount your agency is requesting to recoup from a prior **withholding**.

This request should be made if the following conditions are met:

1. Your agency received a withholding of funds during a prior quarter due to a performance deficiency.

2. Your agency has addressed the deficiency that resulted in the prior withholding.


Expenditures this quarter
$1,000.00
Amount applied to advance this quarter
$1,000.00
Payment requested
Scheduled payment requested this quarter
$1,000.00
Prior overspent funds requested this quarter
$1,000.00
Prior unspent funds requested this quarter
$1,000.00
Prior withholding requested this quarter
$1,000.00

Invoice

Once you have entered values for scheduled payment requested, overspent funds requested, unspent funds requested, and prior withholding requested, the **total payment requested** field will auto-calculate.

In the notes section, please explain any requests for overspent funds, unspent funds, or prior withholdings. Be sure to indicate the prior quarter(s) that these requests pertain to.

Narrative

Respond to each question in the narrative section with sufficient detail to fully explain program successes, challenges, and changes during the quarter. ***Please say "this quarter" instead of identifying a specific quarter in the narrative.***

Content in these sections may range from several sentences to several paragraphs depending on the program.

You do not need to report deliverable numbers in these sections unless you would like to for subgrantees. Overall deliverable numbers are captured in the deliverables report.

Expenditures

Before entering your agency’s expenditures for the quarter, follow instructions in the *Apricot Links* section of this document to link your agency’s budget so the “Positions” and “Grant Year Budget” columns auto-populate.

Expenditures

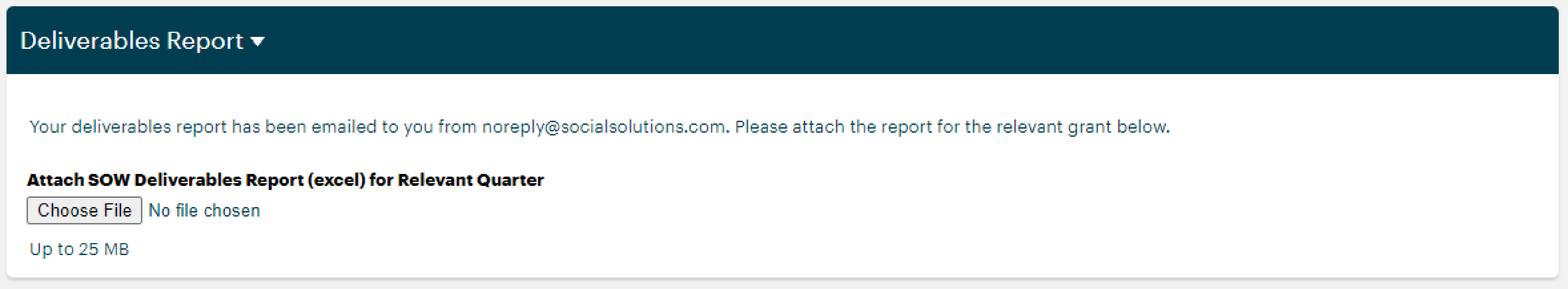
Once you have linked your budget, enter your agency's program expenditures in the "Quarterly Expenditures" column.

> Note: Your agency will be emailed a line-item spenddown report on the 5th of the month after the quarter ends. This report will present total amounts billed by line-item through your agency's last approved invoice.

The field "Total Expenditures for the Quarter" at the bottom of this section will auto-calculate based on expenditures entered. Please ensure "Total Expenditures for the Quarter" matches "Expenditures this quarter" reported in the *Invoice* section of the QPR.

Deliverables Report

Upload a Scope of Work (SOW) Deliverables Report that presents your agency's total deliverable numbers for the quarter. This report is emailed to your agency every Monday.



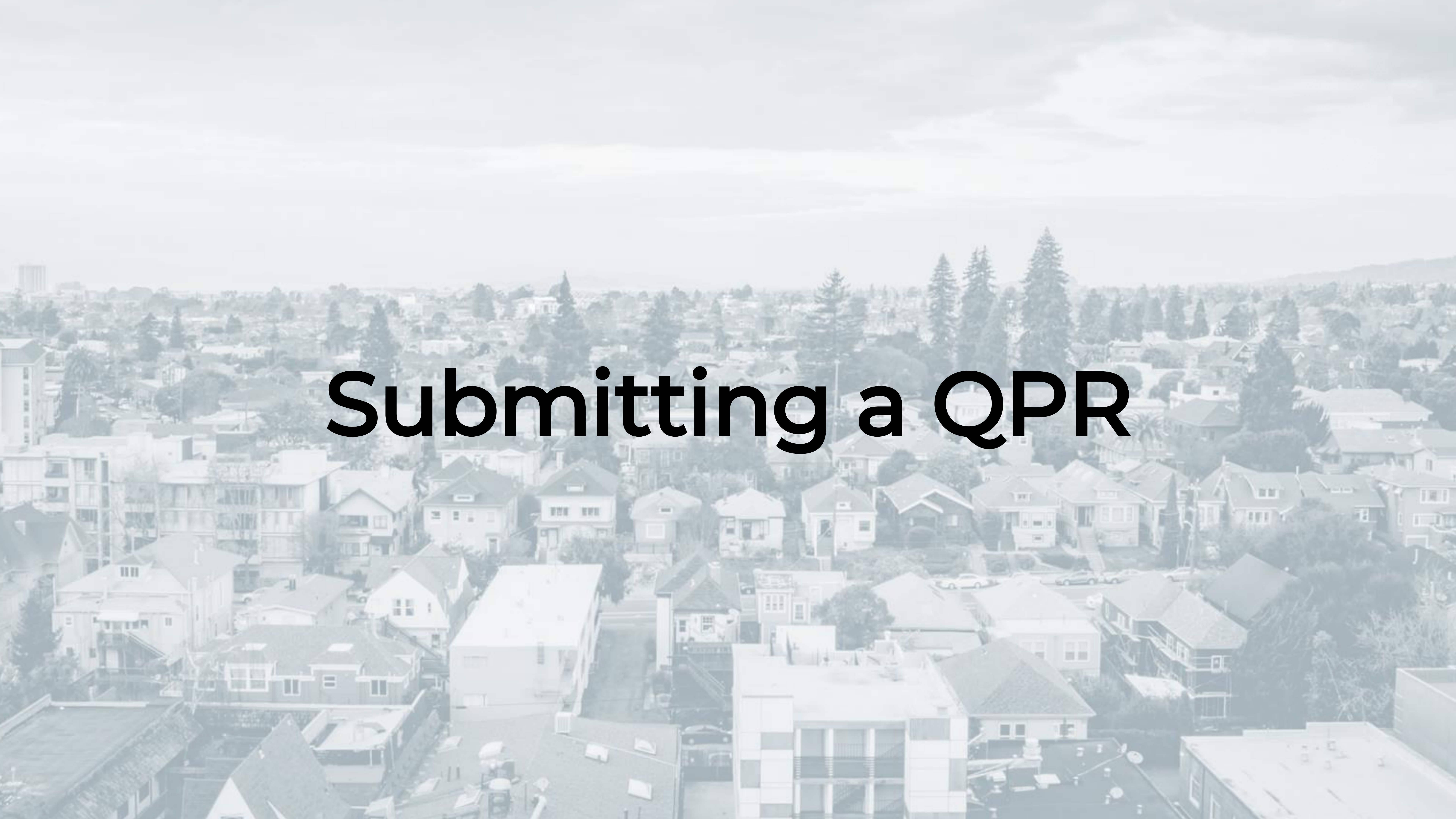
Deliverables Report ▾

Your deliverables report has been emailed to you from noreply@socialsolutions.com. Please attach the report for the relevant grant below.

Attach SOW Deliverables Report (excel) for Relevant Quarter

Choose File No file chosen

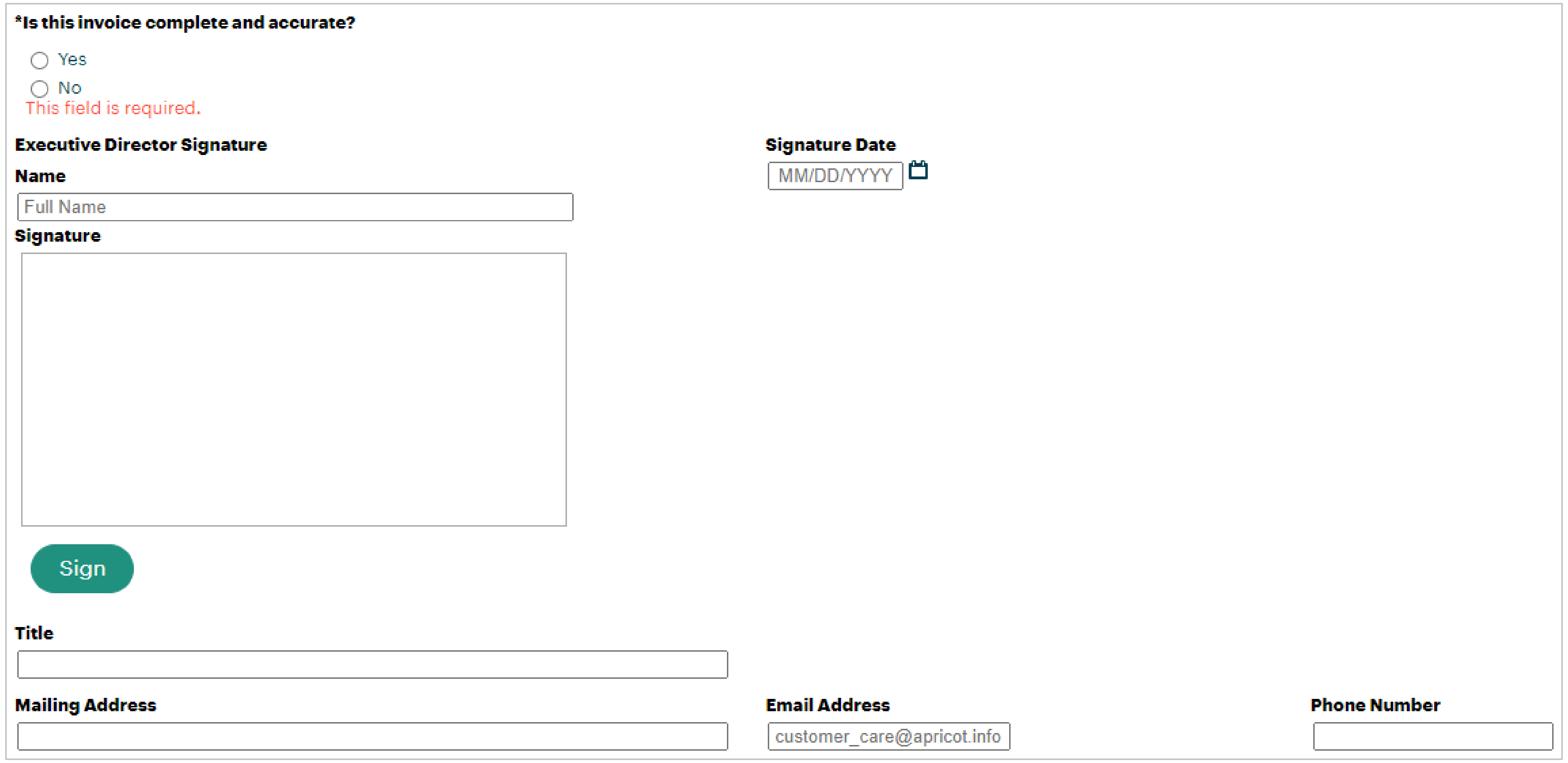
Up to 25 MB



Submitting a QPR

Invoice

Once the QPR has been completed, your agency’s executive director must return to the *Invoice* section of the QPR and complete the fields below. Be sure to click “Save” on the righthand side of the page before closing.



***Is this invoice complete and accurate?**

◯ Yes

◯ No

This field is required.

Executive Director Signature

Name

Full Name

Signature

Sign

Signature Date

MM/DD/YYYY

Title

Mailing Address

Email Address

customer_care@apricot.info

Phone Number

Invoice

When this section is signed, your agency's program officer and planner will receive a notification in Apricot saying the QPR has been completed.

Please note that if your QPR requires corrections after your program officer and planner review it, your agency's executive director will need to **update the signature date** on the QPR once the revisions have been made.