



## Annual Report Guide and Worksheet for most Grants, Loans or Talent Agreements

If you have Site Development or Vibrant Community Grant, use the worksheet found on [this page](#) instead.

The tables below contain the questions you will encounter on the Annual Report. Please utilize this worksheet to gather your information and answers ahead of time as you will not be able to save your work once you begin the report online.

For detailed instructions on logging in, submitting the report, and a glossary of terms, please page 4.

### Full-Time Equivalent Employees

**Total Employees:** *This should not be headcount. Jobs, both created and retained, should be calculated on a full-time equivalent (FTE) basis, obtained by dividing the total number of hours for which W-2 employees were compensated for employment at the Project Site(s) by 2,080. This does not include temporary workers, 1099, etc.*

How many <b>total</b> full-time equivalent employees did the Grantee/Borrower employ at the Project Site(s) in the previous calendar year?	
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How many <b>total</b> full-time equivalent employees <b>who are Ohio Residents</b> did the Grantee/Borrower employ at the Project Site(s) in the previous calendar year?	
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### Payroll

**Total Payroll:** *Payroll as reported on the W-2s for employees of the Grantee/Borrower working at the Project Site(s), not including benefits. Remote employees and employees that were compensated by a Temporary Employment Agency are excluded. Total payroll can include overtime compensation paid to employees.*

What is the <b>total</b> payroll for all full-time equivalent employees reported in the previous question employed by the Grantee/Borrower, at the Project Site(s), in the previous calendar year, as found in box 18 of the W-2?	
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What is the <b>total</b> payroll for all full-time equivalent <b>Ohio residents</b> reported in the previous question employed the Grantee/Borrower at the Project Site(s), in the previous calendar year, as found in Box 16 of the W-2?	
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## Training Investment\*

**\*Not All Agreements have Training Commitments. Please check the "Metric Commitments" section of your Agreement if you are unsure about your specific Commitments.**

**Cumulative Training Investment:** *Total cumulative dollars invested in training of current and new employees from the Effective Date of the Project through the end of the previous calendar year at the Project Site(s). Total Training Investment can include employee wages during periods of training. Total Training investment is not limited to Eligible Costs.*

What is the <b>cumulative</b> number of employees employed by The Grantee/Borrower at the Project Site(s), who have been trained between your Effective Date and December 31 of the previous calendar year?	
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**Cumulative Number of Employees Trained:** *Total cumulative number of individual employees trained at the Project Site(s) from the Effective Date of the Project through the end of the previous calendar year. Total Trained can include both new and current employees.*

What is the <b>cumulative</b> number of employees employed by The Grantee/Borrower at the Project Site(s), who have been trained between your Effective Date and December 31 of the previous calendar year?	
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## Fixed Asset Investment\*

**\*Not All Agreements have Fixed Asset Investment Commitments. Please check the "Metric Commitments" section of your Agreement if you are unsure about your specific Commitments.**

**Cumulative Fixed Asset Investment:** *Total cumulative dollars invested from the Effective Date of the Project through the end of the previous calendar year at the Project Site(s) in building, land, machinery and equipment, and infrastructure. Fixed Asset Investment does not include investments in furniture and fixtures, inventory, working capital, and other operating expenses. Total Fixed Asset Investment is not limited to Eligible Costs as defined in your agreement.*

*JobsOhio employees cannot advise on what qualifies for your company's Fixed Asset Investment other than to advise the use of Generally Accepted Accounting Principles (GAAP). If you have further questions, please consult with your accountant.*

What is the <b>cumulative</b> Fixed Asset Investment made by the Grantee/Borrower at the Project Site(s) between your Effective Date and December 31 of the previous calendar year?	
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## Additional Information

<b>Progress Toward Commitments:</b> Have you met, or will you meet, all your Metric Commitments by the Metric Evaluation Date or Metric Expiration Date (not all Agreements have a Metric Expiration Date).	Yes/No
<i>Please Note IF you select "No": JobsOhio will reach out to discuss the status of the Project, the challenges you are facing, and whether an amendment to the Agreement would be appropriate at this time. In any event, JobsOhio reserves the right to discontinue funding and may seek repayment of funds already disbursed, as provided in the Agreement.</i>	
<b>Update on Project:</b> Please give a brief update on your Project, including any challenges you faced or any changes you think JobsOhio should be aware of.	
<b>Select any challenges you have faced</b>	Unable to find qualified talent Unable to retain talent Market conditions Project delays Change in project scope None Other
<b>Optional DEI Questions:</b>	You will have the option to select from a list of DEI initiatives you have in your organization. Opting in or out will not be considered in JobsOhio's evaluation of your Annual Report.
<b>Certification:</b> You will be required to certify this statement.	By typing my name and title in the boxes below, I certify I am the CEO, CFO, or other company officer authorized to submit the Annual Report information and certify it is true, complete, and correct.
<b>Alternate Contact:</b> You will need to provide an alternate contact at your organization, who is the CEO, CFO, or other company officer authorized to sign on behalf of your organization, should we be unable to reach you regarding your JobsOhio Agreement.	Alternate Contact Information Name Title Email Phone Number

## Annual Report Guide

### Glossary of Terms

**Effective Date:** The date on which reporting for any cumulative Metric Commitments begins. This can be found on the first page of the Agreement

**Full-Time Equivalent:** The measure of Jobs used in the Agreement. The method for calculating this is provided below. JobsOhio Agreements and the Annual Reports do not use headcount as a measure.

**Metric Commitments:** The investments and growth committed to in exchange for the Grant or Loan. These can be found on the first page of the Agreement.

**Metric Evaluation Date:** The date by which the Grantee/Borrower agreed to meet the Metric Commitments

**Metric Expiration Date:** The date through which the Grantee/Borrower agreed to maintain the Metric Commitments

**Previous Calendar Year:** The calendar year for which you are reporting. For example, the Annual Report for 2025 (the previous calendar year) will be due by March 1, 2026.

### Who Needs to Complete the Annual Report

Each Grantee or Borrower with an active Grant or Loan through JobsOhio is required to submit an Annual Report beginning the year the Agreement was executed and through the Metric Expiration Date. The Annual Report for each year is always due March 1 of the next year. For example, if your Agreement was active in 2025, your 2025 Annual Report is due March 1, 2026.

If you are unsure whether you need to submit an Annual Report or why it was emailed to you, please email [performanceteam@jobsohio.com](mailto:performanceteam@jobsohio.com) with:

- Full Name
- Title
- Organization Name
- Program No. (from Page 1 of the Agreement)
- Phone Number
- Email Address
- Your question in as much detail as possible

### Who Can Submit the Annual Report

While anyone can use this worksheet to help you gather the information ahead of the March 1 deadline, the official Annual Report link is only emailed to the currently assigned contact. Grantees and Borrowers find these worksheets to be helpful when they are relying on consultants, tax professionals, and others inside their organizations to assist with reporting.

JobsOhio policy allows for only one contact to be designated at a time. We do not allow for an individual to complete the report on behalf of the assigned Annual Report contact:

- **If the assigned contact would like someone else to be designated to submit this report**, email the JobsOhio Project Performance Team at [performanceteam@jobsohio.com](mailto:performanceteam@jobsohio.com) with:
  - Full Name
  - Title
  - Organization Name
  - Program No. (from Page 1 of the Agreement)
  - Phone Number
  - Email Address
  - A statement certifying this person is the CEO, CFO, or other company officer authorized by your organization to submit the Annual Report information

## How to Log In to Submit the Annual Report

### If you have previously logged into JobsOhio's online platform (for Annual Reports, Applications. Etc.):

On the [Annual Report Page](#):

- Click    
• Log in using your Username and Password
- If you do not remember your username or password:
  - DO NOT USE the "Forgot Password" button
  - Instead, email [performanceteam@jobsohio.com](mailto:performanceteam@jobsohio.com) with
    - Full Name
    - Title
    - Organization Name
    - Program No. (from Page 1 of the Agreement)
    - Phone Number
    - Email Address
    - Your question in as much detail as possible
- A member of our team will reach out to assist you

### If you have not previously logged into JobsOhio's online platform (for Annual Reports, Applications. Etc.):

On the [Annual Report Page](#):

- Click 
- Complete all the fields
  - The "Organization Code" can be found in the Annual Report email that was sent to the assigned contact
- You MUST use the email address linked to the assigned contact in our system in order to create an account
  - If you need to use a different email address, email [performanceteam@jobsohio.com](mailto:performanceteam@jobsohio.com) the following information:
    - Name
    - Organization Name
    - Program No. (from Page 1 of the Agreement)
    - The email address to which the Annual Report email was sent
    - The new email address you would like us to assign to you in our system
  - If you need to reassign the Annual Report to someone else in your organization, please follow the instructions in the "Who Can Submit the Annual Report" section above