FLORIDA ASSOCIATION OF FREE & CHARITABLE CLINICS

Reporting Guidance: First Grant Narrative
January 7, 2025

Agenda

1. **Salesforce Navigation**

2. **Grant Narrative Scoring**

3. **Reporting Deadlines**

What's Included?

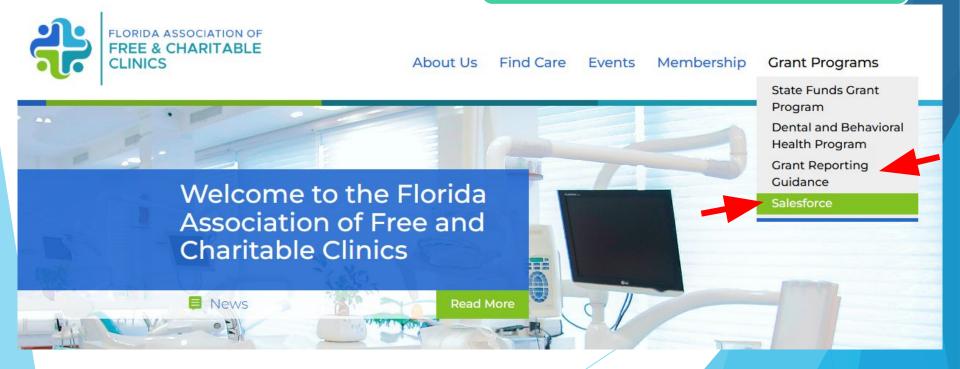Grantees will be asked to report on the following from July 1 to December 31

Implementation Steps

Outcomes

Expenses
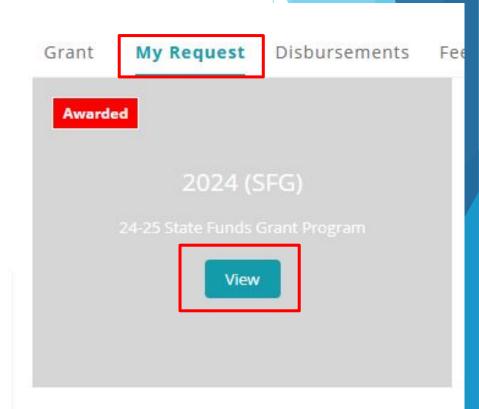
Accomplishments & Challenges

Navigation

Navigation: Login

- **Use your Project Liaison login to access your account** *(one per clinic)*
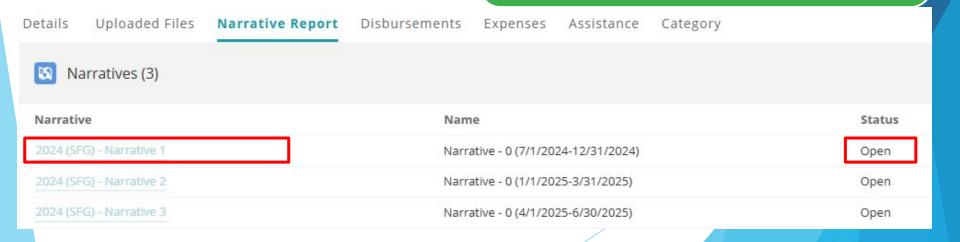
- **If you do not have access, contact kendall@fafcc.org**

Navigation: Reports

- **The "My Request" tab shows your Awarded grants**

- **Select "View" for the grant where you wish to complete the narrative**

Navigation: Reports

- **Under "Narrative Report" tab, select Narrative 1**

- **Look for status change to "Complete" to ensure submission**

Details	Uploaded Files	**Narrative Report**	Disbursements	Expenses	Assistance	Category

Narratives (3)

Narrative	Name	Status
2024 (SFG) - Narrative 1	Narrative - 0 (7/1/2024-12/31/2024)	Open
2024 (SFG) - Narrative 2	Narrative - 0 (1/1/2025-3/31/2025)	Open
2024 (SFG) - Narrative 3	Narrative - 0 (4/1/2025-6/30/2025)	Open

Navigation: Save and Submit

Complete narrative fields outside of Salesforce and copy/paste

Save frequently during completion and before exiting

Type name to sign, submit when narrative is fully complete

Signature

I, the Project Liaison, hereby certify that all of the information contained in this progress report is true and accurate to the best of my knowledge by typing my name below.

*

Complete this field.

Before clicking submit, please review your grant narrative report to confirm all recorded expenses, calculations, and progress is accurate and ready for submission.

Previous   SUBMIT

Navigation: Expenses

Add Personnel Expense

- **Reporting categories based on your awarded funding**

- **Add expenses to each table as separate line items**

Expense Table

		Date Expensed	Line Item Descri... ⌄	Designation Areas ⌄	Service Type ⌄	Amount Spent by... ⌄	An
1	☐	Dec 1, 2024	ARNP Salary	Clinical Staff/Healthcare Providers	Health Services	$1,750.00	
2	☐	Jul 1, 2024	Medical Director ...	Executive/Administrative/Support...	Health Services	$3,500.00	

Expenses to Date

Total Expenses for First Reporting Period: $5,250.00

Remaining Balance: $9,750.00

Table will calculate Total Expenses and Remaining Balance

Navigation: Expenses

CMR Licensing

An invoice for this expense is sent directly from FAFCC in December and is accounted for separately. This amount should not be reported in the expense table.

Invoice Amount:

$125

Invoice Amount Paid:

125

FAFCC Conference Award

The award amount listed below must be expensed towards the 2025 Annual Conference and must be pa[...] will open on the FAFCC website by June. This amount is accounted for separately and should not be rep[...]

Conference Award Amount:

$700

Amount Expensed on Conference Award:

Enter $125 for CMR Licensing

Conference Award will not be expensed during this reporting period

Navigation: Expenses

- **Upload documentation for each line item expenditure**
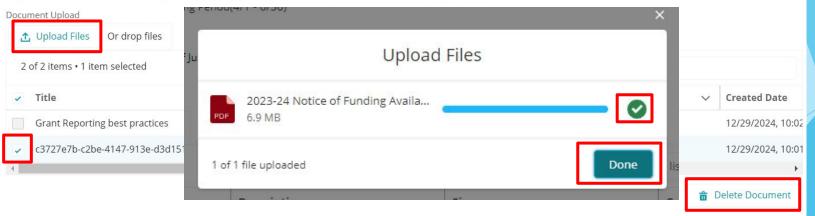
- **Invoices, paystubs, receipts, purchase orders, Quickbooks export**

Expenditure Document

Attach documentation for each of the line items included in your expense tables on the category page clearly labeled to help match up with the reported expenditures.

Upload files and then click "Save" at the bottom of the page to display files in the table below.

Document Upload

⬆ Upload Files | Or drop files

2 of 2 items • 1 item selected

✓	Title
☐	Grant Reporting best practices
✓	c3727e7b-c2be-4147-913e-d3d151

Upload Files

📄 PDF 2023-24 Notice of Funding Availa...
6.9 MB   ✓

1 of 1 file uploaded   **Done**

⌄	Created Date
	12/29/2024, 10:02
	12/29/2024, 10:01

🗑 Delete Document

Save

Click "Save" to see documents list

Navigation: Salesforce Demo

Grant Narrative Scoring

- FAFCC will evaluate each narrative report on a 30-point scale.

- Combined with a 10-point scale for the Patient Services and Annual Valuation Reports for a total of 100 potential points for the grant cycle.

- This aggregate score will guide funding decisions for the next grant cycle.

Grant Narrative Scoring

Timeliness of submission - 3 points

Full points will be awarded for reports submitted on or before the deadline; late reports will receive none.

Outputs - 5 points

The extent to which the report details the steps taken to implement the awarded funding - outlining activities and scope of work to date.

Listing Assigned Personnel - 3 points

The extent to which all staff hired or assigned as part of this grant funding are listed in the report with detail and accuracy.

Outcomes - 5 points

The extent to which the report uses metrics to describe progress made toward the originally proposed goals and objectives.

Grant Narrative Scoring

Highlights/Accomplishments – 3 points

The extent to which the report describes projects and programmatic accomplishments made possible by this grant funding.

Additional Information - 3 Points

The extent to which the report outlines unexpected outcomes, positive learning experiences, funding leveraged as a result of this grant, or patient success stories.

Funding Enhancements - 3 points

The extent to which the report explains how this funding has enhanced organizational capacity, effectiveness, and efficiency.

Expenditure Documentation - 5 points

The extent to which the report details expenses for each budget category - appropriately categorized, and clearly comparable to attached documentation.

Best Practices: Demonstrating Progress

Outputs

1. Steps taken to implement the program/award funding
2. Indicate whether the program/project is being implemented as planned

Outcomes

1. Detail progress made toward goals and objectives outlined in original proposal
2. Measure whether the program or project is achieving the expected effects/changes in the short, intermediate, and long term
3. Should incorporate a balance of both quantitative & qualitative metrics

Best Practices: Demonstrating Progress

Proposed Outcomes

Reduce patient appointment no-shows by 20%.

Outputs

1. Created and administered a survey to identify patient challenges and barriers to compliance.
2. Developed and implemented an automated appointment reminder system.
3. Designed educational materials to emphasize the importance of maintaining scheduled appointments and trained key staff on effectively communicating with patients.

Outcomes Reporting

By collecting 100 responses to our survey, we identified the primary barriers to compliance for patients as transportation and forgetfulness. Staff and patient feedback indicated improved patient satisfaction with the appointment reminder system and enhanced patient awareness due to the educational materials. This quarter has seen a reduction in no-shows from 40 to 36 which is a 10% reduction.

Reporting Deadlines

▶ **First Grant Narrative with expenditure documentation**

  ○ **Due: Wednesday, January 15, 2025**

  ○ **Reporting Period: July 1 - December 31, 2024**

▶ *Staff will be available until close of business (5 pm EST)*

Compliance Policy

- FAFCC must enforce deadlines in order to meet deliverables established by DOH.

- Grantees will receive a 24-hour grace period.

- FAFCC will assist Grantees with outstanding deliverables before additional action is taken.

- Action may include the following:
  - Written notice attached to grantees performance, which may affect participation in future cycles
  - A request for a monitoring call
  - A hold on future disbursements

Questions