Direct Service Providers
Required Smart Start In-Service
August 12, 2024

Agenda

I. Opening Remarks & Updates   Mary Sonnenberg   10:00 am – 10:15 am

II. Smart Start Financial Update   Michelle Downey, Karen Staab   10:15 am – 10:45 am
- a. Contracts Update
- b. Fiscal Monitoring
- c. Smart Start Cost Principles
- d. Budget Revisions / Amendments
- e. Quarterly Report / Cash & In-Kind Program Match

III. Smart Start Program Expectations and Requirements – P&E Staff   10:45 am – 11:30 am

- a. Overview and Update on Salesforce   Pamela Federline
- b. CAD and Logic Model Updates   Heather Gallagher
- c. NCPC Updated Outputs and Outcomes in 2024-25   Heather Gallagher
- d. Reporting Updates Using Salesforce: Steven Gipson
  Program Narratives/Special Stories
  Professional Development
- e. Program Monitoring 2024-25   Heather Gallagher/Steven Gipson

IV. Closing Remarks   Pamela Federline   11:30 am*

Times are approximate. With experienced DSPs, it may pace more quickly.

Smart Start Financial Update

See DSP Contract_Fiscal Combined FY 24-25_Final at ccpfc.org/dsp

GRANT EXPECTATIONS AND REQUIREMENTS
FY 2023-24

See DSP Inservice2024-25_P&E at ccpfc.org/dsp

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THANK YOU!!

Thank you for all your hard work in assisting with completing Formal Site Visit reports and submitting your fourth-quarter and year-end reports.

While not without challenges everyone rose to the occasion to get reports completed.

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Data Management Update

- P&E is working collaboratively with Community Engagement and Fionta to develop a Salesforce data entry and management solution for applicable programs (**Program Management Module – PMM**)

- Programs that use other external databases will continue to provide required supporting documentation.

- Ultimately, using Salesforce across PFC will help us better connect our work with the individuals, agencies, and programs we serve.

- The development of program modules for reporting is limited by available funds and the effectiveness based on program size.

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Key to Effective Grant Management

COMMUNICATION

❖ Quarterly Reports/Narratives & Special Stories **on time**

❖ Formal Site Visits (FSV) at least once during the third quarter, sometimes more frequently if on a System of Support.

❖ Tell us about program modifications requiring a change to your activities, outcomes, or what you track (e.g., CAD, logic model)

❖ Changes to the program point of contact / key personnel

   ❖ Budget / Contract Related Questions: Contact **Karen Staab**, kstaab@ccpfc.org

   Michelle Downey, mdowney@ccpfc.org

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Smart Start
Grant Expectations and Requirements

❖ **Document for Review and Signature (Packet)**

❖ **Contract Activity Description (CAD)**

  ▪ What you agreed to provide <u>and</u> measure for Smart Start. *(Are changes needed?)*

❖ **Logic Model**

  ▪ How do you know who to provide services to? *(Established Need)*

  ▪ Who do you provide them to specifically? *(Target population – has this changed since allocation?)*

  ▪ How do you track activities? *(Outputs)*

  ▪ How do you track results? *(Outcomes)*

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Grant Expectations and Requirements

❖ **Contact Information Form (in packet)**

❖ **Media Consent Form (in packet)**

❖ **Dates for Reporting Outputs, Outcomes, and Program Progress Reports**

	Quarter Dates	Due Date to P&E	Due Date to NCPC
1st Quarter	July 1 through September 30, 2024	October 15, 2024	October 31, 2024
2nd Quarter	October 1 through December 31, 2024	January 15, 2025	January 31, 2025
3rd Quarter	January 1 through March 31, 2025	April 15, 2025	April 30, 2025
4th Quarter	April 1 through June 30, 2025	**July 15, 2025***	July 31, 2025

- Programs must review **ALL FOUR QUARTERS** for accuracy.
- Any **changes** must be reported in writing.
- July 15th is a **HARD** deadline to give us adequate time to review and troubleshoot.

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9

Questions for Review

❖ **Grant Expectations and Requirements Questions**
  ▪ **Programmatic Requirements—**Has the activity model been **modified** at the national, regional, or state level? If so, update the model on file with PFC.
  ▪ **Reporting Outputs and Outcomes** – Has anything changed in the way you deliver **services**, **or** in your **program activities**?
  ▪ **Review CAD and Logic Model for changes**. If you still need to consider a CAD change, please request a meeting with Pamela Federline for assistance.

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Programmatic Requirements

❖ **Routine Manager Review** - Review data entered on any existing reports, including external software, to assist with missing data and accuracy prior to submitting reports to P&E.

❖ **Desktop Monitoring –** Review of program by data *prior to* NCPC report submission

❖ **Quarterly Reporting –** Report/Narratives/Professional Development review for accuracy *before* submission

- After the quarterly reports have been submitted to P&E, DSP staff **MUST** notify our team *before* making changes to data in the current or prior quarters. *This is particularly important for prior quarter data already submitted to NCPC.* **At year-end, staff may not make any changes to data without prior authorization and review with P&E staff.**

❖ **Documentation**—For needed items, See Page 3 of the Grant Requirements. Send to your **assigned QA Specialist**; submit all supporting files/data (i.e., Absolutely no data .pdf). **If you have questions, please ASK**.

❖ **Formal Site Visits** – A few in January, predominantly February to early March

Assigned Quality Assurance Specialists

Heather Gallagher:

❖ CCR&R

❖ Child Care Health Consultants

❖ Parents for Higher Education**

(including SSRS)

❖ Hoke County Evaluations

Steven Gipson:

❖ Community Engagement**

❖ Family Connects

❖ Kaleidoscope Play & Learn**

❖ Learning Library**

❖ Statewide Contracts as applicable

**Denotes programs using PMM Salesforce Platform. Steven is the primary support for troubleshooting PMM modules.

Programmatic Requirements

We anticipate a new Contract Management Data System will be deployed by mid-year and reporting requirements may shift and will require training and patience during the transition with a dual system of reporting.

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Contract Activity Description Relationship to Outputs and Outcomes

Family Connects is a regional home-visiting activity for families with newborns that provides services for the newborn and all household members following the Family Connects International (FCI) home-visiting model. Home visiting and related follow-up will include connecting families to resources and/or referrals based on the FCI four domains of support services family health care, infant care, safe home, and other family needs. Clinical and non-clinical staff will connect with the newborn's family in the hospital setting or shortly after being released to inform the family about the program and schedule a visit. Visits are conducted either in-home or via telehealth, based on the family's comfort. Families receive between one and three visits, along with post-visit calls. The program will offer support and resources to families who do not accept a visit from our Family Connects activity or another Partnership internal or external activity. The current catchment area includes families giving birth at Cape Fear Valley Health that reside in Cumberland, Hoke, or Robeson counties. The program will include the evaluation of expansion to other hospitals, in-home births, and residents from other counties in the region. A nurse from a contracted nurse partner will conduct all clinical visits. Families not in the catchment area but interested in support will receive referrals to their local Partnership for programs and resources.

Additional costs will include webpage development and other technical infrastructure for systems integrations, required LP cost allocations (space, utilities, and other administrative expenses), marketing and outreach not covered by other sources of funds, and support materials for eligible participants following locally approved policies and procedures. The activity will host internal and external meetings that may include food. The LP may use contracted services, technology, and consultants. The LP will use multiple funding streams to support staffing, purchase of materials, and coordination of this activity. Following programmatic guidelines, Smart Start funds may be used to purchase materials, supplies, gift cards for completing nurse home visits, and more as both incentives for family participation and to support identified needs of specific families based on nurse home visits.

Outputs – Agreed on activities measured by Quarter

Enter Unduplicated Data for Outputs for 2024 - 2025

FS Family Connects

Question	Q1	Q2	Q3	Q4	YTD Total
Number of parents/guardians participating					0
Number of participants who completed demographic responses					0
a1 Number of Hispanic or Latino parents/guardians participating					0
a2 Number of non-Hispanic/Latino parents/guardians participating					0
a3 Number of NonResponses for Ethnicity					0
b1 Number of American Indian or Alaska Native parents/guardians participating					0
b2 Number of Asian parents/guardians participating					0
b3 Number of Black or African American parents/guardians participating					0

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Services and Support

❖ Let us know what services your Quality Assurance staff can provide to help you succeed in implementing your program/activity.

❖ Please ask for help **before** reports are due, including additional training in how to complete the program spreadsheet if applicable. We can provide 1:1 training for staff if needed – particularly for new staff or those with new reporting responsibilities.

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Documentation

❖ Please send all documentation via email to your assigned Quality Assurance Specialist.

❖ If you use a survey, please work with P&E to create the survey in an approved format using Qualtrics unless your program is set up for Salesforce auto-surveys to participants.

Annual Impact Report / 990 Reporting

❖ Your narratives and success stories are **<u>VERY</u>** important for both annual reporting and in telling the story of the work we all do through Impact Reports.

❖ P&E will review everything submitted for FY 2023-24 and consider whether additional information is needed. If so, a request will be sent by **August 18th** and due by **August 30th**.

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Data Management Update

- Professional Development and Narratives/Special Stories will be submitted via forms accessible on ccpfc.org/dsp

- Professional Development is not limited to Smart Start programs and can assist managers with supporting performance conversations.

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Formal Site Visit/Monitoring

❖ Each activity from FY 2023-24 received a signed copy of the Formal Site Visit Monitoring Report. Quality Assurance Staff will contact you regarding any **outstanding follow-up items**, which will be incorporated into Desktop Monitoring as applicable.

❖ Schedule your FSV by **August 31st with your assigned Quality Assurance Specialist.**

❖ What to Plan for during your Site Visit:

  ▪ Advance questions will be sent for completion **before** the visit.

  ▪ A percentage of service records and related documentation to be reviewed as applicable. Some programs may have **100%** of records reviewed.

  ▪ Discussion on successes and barriers to implementing your program.

  ▪ Draft report sent to you for feedback and any missing documentation.

  ▪ Any edits submitted are completed, and a final report is sent to the Program / Agency Lead for signature.

  ▪ The final report is sent to the President and Board Chair to complete the process.

First quarter reports will be due in ~~90 days~~ 63 days!

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Thank You

For more information on any of the following areas, contact:

Planning & Evaluation: (CADs, Logic Models, Reporting, RFP, etc.)

Pamela Federline	VP P&E	pfederline@ccpfc.org
Heather Gallagher	Quality Assurance Specialist	hgallagher@ccpfc.org
Steven Gipson	Quality Assurance Specialist	sgipson@ccpfc.org

Community Engagement: (Marketing, Logo Use, Community Outreach and Volunteering)

Sharon Moyer	CED Administrator	smoyer@ccpfc.org
Daniele Malvesti	Community Outreach Coordinator	dmalvesti@ccpfc.org

Visit the DSP Portal on the Partnership's Website: https://ccpfc.org/dsp

For Fiscal Support, please contact:

Karen Staab	Fiscal Monitor	kstaab@ccpfc.org
Michelle Downey	Contracts Coordinator	mdowney@ccpfc.org

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