



**Direct Service Providers
Required Smart Start In-Service
August 24, 2026**

Agenda – August 24, 2026

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|--|------------------------------|---------------------|
| I. Opening Remarks & Updates | Mary Sonnenberg | 10:30 am – 10:45 am |
| II. Smart Start Financial Update | Michelle Downey, Karen Staab | 10:45 am – 11:30 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 | | 11:30 am – 12:30 am |
| a. Logic Model Updates | Heather Inman | |
| c. NCPC Updated Outputs and Outcomes in 2026-27 | Steven Gipson | |
| d. Reporting Updates Using Salesforce: | Steven Gipson | |
| Program Narratives/Special Stories | Heather Inman | |
| Professional Development | | |
| e. Program Monitoring 2026-27 | Heather Inman/Steven Gipson | |
| f. Upcoming RFP Allocation Cycle | Pamela Federline | |
| IV. Closing Remarks | Pamela Federline | 12:30 am* |

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



Smart Start Financial Update

See DSP Contract_Fiscal Combined FY 26-27_Final at ccpfc.org/dsp

GRANT EXPECTATIONS AND REQUIREMENTS FY 2026-27

<https://ccpfc.tfaforms.net/5170658>



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FIRST – A THANK YOU!!



We appreciate your hard work throughout the year in completing and submitting your fourth-quarter and year-end reports, as well as your support with the monitoring reports.

Data Management Update

- We completed the first year of using NCPC **DATA TEMPLATES** for submission of reports into the Contract Management Data System (CDMS).
- All Programs that use *other external databases* will continue to provide required supporting documentation in collaboration with your assigned Quality Assurance Specialist.

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 (logic model)
- ❖ Changes to the program point of contact / key personnel
 - ❖ Budget / Contract Related Questions: Contact **Karen Staab**, kstaab@ccpfc.org - Fiscal
 - Michelle Downey**, mdowney@ccpfc.org -Contracts

Smart Start

Grant Expectations and Requirements

- ❖ **Document for Review and Signature (Packet)**
- ❖ **Contract Activity Description (CAD)**
 - CADs can no longer be changed.
- ❖ **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*)

Grant Expectations and Requirements

- ❖ **Contact Information Form (electronic form)**
- ❖ **Media Consent Form (electronic form)**
- ❖ **Dates for Reporting Outputs, Outcomes, and Program Progress Reports**

	Quarter Dates	Due Date to P&E	Due Date to NCPC
1 st Quarter	July 1 through September 30, 2026	October 15, 2026	October 31, 2026
2 nd Quarter	October 1 through December 31, 2026	January 15, 2027	January 31, 2027
3 rd Quarter	January 1 through March 31, 2027	April 15, 2027	April 30, 2027
4 th Quarter	April 1 through June 30, 2027	July 15, 2027*	July 31, 2027

Some programs may elect to provide data before the 15th of the month if jointly agreed between the program and QA Specialist.

- 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.

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 the Logic Model for changes**. If you need to update your logic model, please request a meeting with Pamela Federline for assistance.

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 the Grant Requirements. Send to your **assigned QA Specialist**; submit all supporting files/data (i.e., **Absolutely no data send in .pdf form**). **If you have questions, please ASK.**
- ❖ **Formal Site Visits** – A few in January, predominantly February to early March

Assigned Quality Assurance Specialists

Heather Inman:

- ❖ CCR&R
- ❖ Child Care Health Consultants
- ❖ Parents for Higher Education**
(including SSRS)
- ❖ Hoke County Evaluations

Steven Gipson:

- ❖ Community Engagement**
- ❖ Dolly Parton Imagination Library
- ❖ 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

*The Contract Management Data System used by NCPC
Annual Submission of Activities includes updated data
templates, which will be downloaded and provided to
programs.*

Programmatic Requirements

Evidence-Based, Evidence-Informed practices are now referred to as **SMART SOLUTIONS**. The Contract Activity Descriptions are standardized and have only a few local modifications allowed based on how programs are delivered, the target population(s), and budget, for example.

Every program has a [Smart Solutions related webpage](#) outlining details about the solution, its research, related evaluation expectations, and more. Programs can have more than one solution. For example, CCR&R has 12 solutions, CCHC has 3, etc. Solutions *may* have more than one data template.

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.

Services and Support

- ❖ Best practice is to summarize data **monthly** rather than waiting until the end of each quarter, particularly for larger programs with more participants.
- ❖ While the manner in which data is summarized and reported is different, supporting documentation for each quarter is still required for monitoring and quality assurance of information submitted.

Documentation

- ❖ Please send all documentation via email to your assigned Quality Assurance Specialist – or use agreed upon folders available in shared drives.* *Please make sure your specialist has access to the folder(s).*
- ❖ 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.



**For internal programs, the move to SharePoint will simplify this process.*

Annual Impact Report / 990 Reporting

- ❖ Your narratives and success stories are **VERY** 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 2025-26 and consider whether additional information is needed. If so, a request will be sent by **August 26th** and due by **August 31st**.

Data Management Update

- Professional Development and Narratives/Special Stories will still 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.

Formal Site Visit/Monitoring

- ❖ Each activity from FY 2025-26 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~~ 52 days!



Thank You

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

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

Pamela Federline	Vice President, P&E	pfederline@ccpfc.org
Heather Inman	Quality Assurance Specialist	hinman@ccpfc.org
Steven Gipson	Quality Assurance Specialist	sgipson@ccpfc.org

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

Daniele Malvesti*	Community Engagement Administrator	dmalvesti@ccpfc.org
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**Daniele will filter things out to the appropriate staff for social media requests, community events, etc.*

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

For Fiscal Support, please contact:

Karen Staab	Accounting Manager	kstaab@ccpfc.org
Kesia Wilson	Fiscal Monitor	kwilson@ccpfc.org
Michelle Downey	Contracts Coordinator	mdowney@ccpfc.org



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