

Grantee Information Webinar:

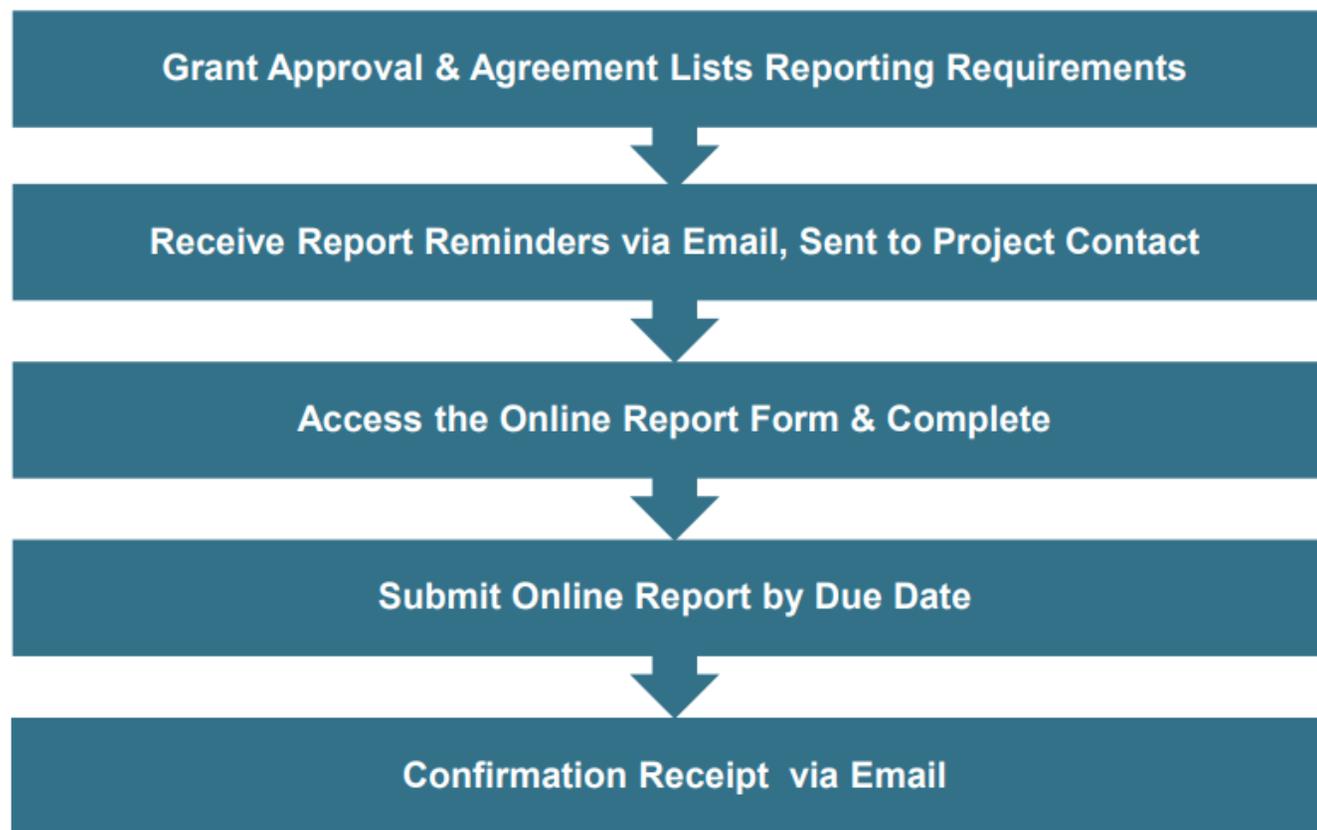
ONLINE REPORTING IN FLUXX



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When Do I Report and What Do I Do?



Accessing Your Online Report



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How Do I Access My Online Report?

- If you are a current user with a TCHF Fluxx account, you'll receive a reminder email 35 days prior to report due date that will have links to:
 - The Grantee Portal (report located in the “Upcoming Reports” Section)
 - Sample Report Guide
 - FAQs
 - Contact information if you have additional questions
- If you are new to the THCF Fluxx grantee portal, please first create an account on the login page. The Grantmaking Operations department will be in touch with your login credentials to access to the grantee portal and report information.





How Do I Log In To Access the Report?

- Click the link in the email.
- Log in with your email and password.
 - If the password is not known, select the “Reset or Create Password” and a temporary password will be sent to you by email.
 - Please contact us with any questions at grants@coloradohealth.org

The screenshot shows the login page for the Grants Portal. At the top center is the logo of The Colorado Health Foundation, a stylized sunburst. Below the logo is the text "The Colorado Health Foundation™" and "Welcome to the The Colorado Health Foundation's Grants Portal".

On the left side, under the heading "Login Now:", there are two input fields: "Username" and "Password". Below these fields is a "Sign in" button. A link "Reset or create password" is located below the "Sign in" button.

On the right side, under the heading "New to the Grants Portal?", there is a section titled "Create Your Organizational Profile". The text explains that to be considered for funding, users must first introduce themselves and tell us about their organization. It instructs users to click on the "Create an account Now" button to start. It also notes that users will not be able to edit their profile after submission and that they should ensure they have entered accurate information (including email address) when completing the registration form. Below this text is a "Create an account now" button.

At the bottom center, there is a logo for "POWERED BY FLUXX" with a small colorful icon to the left of the text.

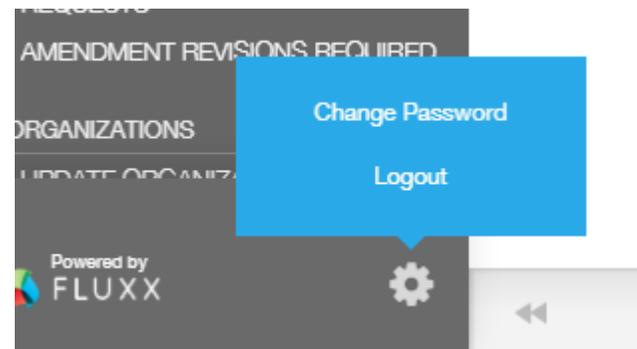


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How Do I Log In To Access the Report?

- Once logged in, if you wish to update your password, please select the wheel icon in the bottom left corner and select “change password.”
 - Follow the prompts





How Do I Access My Report?

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Search...

Sample Nonprofit Organization
G-9593
Progress Report - Standard
State: Draft
Due: 5/15/2018
Healthier Colorado Kids
Program Lead: Dave Grant
Healthier Colorado Kids

Sample Nonprofit Organization
G-9593
Deliverable - Grant Deliverable
Report Type: Memorandum of Understanding
State: Draft
Due Date: 5/15/2018
Received Date:
Review Due Date:
Done Date:
Program Lead: Dave Grant
Healthier Colorado Kids

Sample Nonprofit Organization
R-9518
Final Report - Standard
State: Draft
Due: 5/31/2018
Social Determinants of Health in Fruita
Program Lead: Dave Grant
Social Determinants of Health in Fruita

Sample Nonprofit Organization
G-9593
Final Report - Standard
State: Draft
Due: 5/31/2018
Healthier Colorado Kids
Program Lead: Dave Grant
Healthier Colorado Kids

Sample Nonprofit Organization
R-9509
Deliverable -
Report Type:
State: Draft
Due Date: 5/1/2020
Received Date:
Review Due Date:
Done Date:

- Once you are in the Grantee Portal, scroll down and click on the “Upcoming Reports” section.
- All upcoming reports associated with your account for your organization are located here.
 - Reports are organized by date, with the closest date at the top.
 - Be sure to find the correct report or grant deliverable, by Grant Number, Project Title and Due Date.
 - If you have questions about which report is due, contact us.



Completing and Submitting the Report



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Completing Your Online Report

As you complete the report form sections, keep in mind a few items:

- Refer to your organization's grant agreement and consider any changes made via amendments.
- You may want to write the sections in a word-processing document and copy and paste them into the appropriate sections.
- Although all grant milestones are listed, information provided in your responses should address all activities since last report.
- Reports should be concise and include only relevant information (1-2 paragraphs per question).
- Refer to the Sample Report Guide resource for support.
- Click “Edit” at the top of the page when you are ready to get started.
- **We recommend saving your work often as you go through the report. The system does not auto save.**





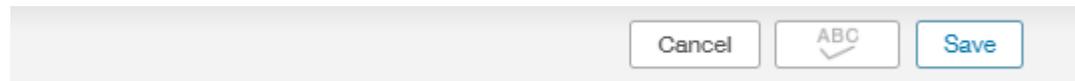
Open Your Report for Editing

- The report is view only unless it is moved to Edit Mode
- In the top right corner, select the “Edit” button to begin working on your report



Sample Nonprofit Organization
R-9518 - Progress Report

- The Report does not autosave, please click “Save” in the bottom right corner periodically as you work through your report.



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Organization Information and Grant Summary

- The organization and grant summary are located at the top of the report.
- This information is read-only for reference and for you to review for accuracy.
- If any information needs updating, please address it in the Organization or User section of the grantee portal. Or reach out to us at grants@coloradohealth.org and we will update the record.





Intermediate Milestones

- The intermediate milestones in your grant agreement will be listed for easy reference above your narrative section. Please address progress made towards each of those milestones that relate to the current reporting period.
- Note: Team Based Care and Rapid Response grants will not have this section.





Intermediate Milestones

Milestones

What are the intermediate milestones?

- Recruit and hire program director in July 2018
- Purchase curriculum and confirm site participation for September 2018
- Program director and support staff will attend training in October 2018
- Begin implementation of Making CO Healthy intervention in November 2018
- Provide Making CO Health Intervention to 500 low-income Coloradans during year one of grant to increase the number of individuals who eat adequate amounts of fruit and vegetables daily.

Give an update on the intermediate milestones as specified in your organization's grant agreement, focusing on the milestones that relate to those in this reporting period.

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Measurable Results

*THIS SECTION APPLIES TO GRANTS WHERE MEASUREABLE RESULTS WERE INDICATED IN THE AGREEMENT. IF YOUR GRANT DOES NOT CONTAIN MEASURABLE RESULTS, THIS WILL NOT BE A SECTION ON YOUR REPORT

- Provide an update on the measurable results as specified in your grant agreement focusing on the measurable results that relate to the specific reporting period.
- The anticipated measurable results for the reporting year will be populated as well as any past reporting of anticipated and actuals for reference.





Measurable Results

Measurable Results (Progress Report)

1. Increase number of children and adults who engage in moderate to vigorous physical activity

Request MR 1 Year 1 Anticipated Quantity: 250

MR 1 Year 1 Actual Quantity:

2. Increase number of children and adults who eat adequate amounts of fruits and vegetables daily

Request MR 2 Year 1 Anticipated Quantity: 250

MR 2 Year 1 Actual Quantity:

Describe the method used to track and calculate these results.

Describe any deviations from the initially predicted results as specified in your grant agreement.



Successes and Challenges

- In this section, you'll share significant successes and challenges your organization faced related to the grant during this reporting period.
- **EXAMPLE:** A significant success may be that 90% of program participants successfully completed the program and neighboring communities have also requested to participate. A challenge may be that it took longer than expected to recruit and hire a Program Director and therefore, specific grant activities and intermediate milestones were delayed.



Successes and Challenges

Success and Challenges

Please describe the significant successes the organization experienced related to the grant

Please describe the significant challenges the organization experienced related to the grant.

Please describe what the organization has learned based on the results, successes, and challenges.

Please address all programmatic, evaluative, or organizational changes that may or will be made based on the lessons learned.



Additional Information

- These sections are not required.
- Please feel free to share anything related to the grant or your organization. As well as any recommendations you have for the Foundation.



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Additional Information

If applicable, please share anything else that happened during the grant period that impacted the organization positively.

If applicable, please share anything else that happened during the grant period that impacted the organization negatively.

Please share with us any recommendations you have for our grant making or reporting process.

Please report anything else you would like to share, as it relates to the progress and outcome of the grants.



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Financial Information

- Report on items such as the grant's actual expenditures as compared to the approved budget and explain any variances, your organization's financial position, identify any unspent funds from the Foundation and your proposed plan for spending these funds.
- Keep in mind any budget revisions that have been approved by the Foundation since the initial award and original approved grant budget.
- In the documents section, you will find a link to the required format for reporting back on actual expenditures as compared to the approved budget for your grant - refer to your grant agreement if needed. **This pertains specifically to the funds received by the Colorado Health Foundation.**
- Click on the link to open the format, save this document on your computer, input and save the actual expenditures for the current reporting period, and upload this document.



Financial Information

Finance

Referring to your organizations financial statements for the year(s) in which the grant was used, please explain any significant changes in your financial position.

Please list your total project budget. (If you are receiving general operating funds from the Foundation, the total project budget should be the annual expense figure of your operating budget.)

Considering the specific funds received by the Colorado Health Foundation for this reporting period, please provide a brief budget narrative regarding actual expenses as compared to the approved budget.

If there are any significant discrepancies between actual expenditures compared to the approved budget for your grant, please explain.

Considering all Colorado Health Foundation funds received to date for this grant, what amount of funds remain unspent at this time?

Percent of unspent funds (this is the percent of unspent funds as compared to the funds as compared to the funds received from The Colorado Health Foundation to date.)

If funds remain unspent, please briefly describe why and your specific timeframe for fully expending funds.



Grant Expenditures Form

Budget Report - Actual vs Approved Expenses

Using this format, please report back on the program/project's actual expenditures as compared to the approved budget included in your grant agreement. Keep in mind any budget revisions that have been approved since the initial award. This pertains specifically to the funds received by the Colorado Health Foundation.

Organization Name: _____

Project Title: _____

Request ID#: _____

Actual Grant Expenditures				
	Year 1	Year 2	Year 3	Total
Direct Costs				
General Operating	\$	\$	\$	\$0.00
Program/Project	\$	\$	\$	\$0.00
Personnel	\$	\$	\$	\$0.00
Programming/Project Costs	\$	\$	\$	\$0.00
Administrative costs related to program	\$	\$	\$	\$0.00
Capital	\$	\$	\$	\$0.00
Total Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00
Other Costs				
Consultants	\$	\$	\$	\$0.00
Other	\$	\$	\$	\$0.00
Fiscal Sponsor Fee (if applicable)	\$	\$	\$	\$0.00
Indirect Costs (Max 10%, universities/colleges only - if approved)	\$	\$	\$	\$0.00
Total Other Costs	\$0.00	\$0.00	\$0.00	\$0.00
GRAND TOTAL	\$0.00	\$0.00	\$0.00	\$0.00



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Attachments

REQUIRED DOCUMENTS:

- MOST RECENT INCOME STATEMENT
 - MOST RECENT BALANCE SHEET
 - ACTUAL GRANT EXPENDITURES
-
- Public Entities and School Districts, please upload your most recent audit for the financial requirements, as that is likely the most recent available.
 - Certain grant types might have additional required attachments, which will be listed on your report.



Attachments

OPTIONAL DOCUMENTS (EXAMPLES):

- ADDITIONAL EVALUATION RESULTS
 - PICTURES
 - ANNUAL REPORTS
-
- These documents may be included, if you wish to share them with the foundation, they are not required.
 - Should you wish to request an Amendment, please do so in the “Request and Amendment” section of the grantee portal.



Attachments

UPLOADING INSTRUCTIONS

Required Attachments

- Click the green plus button next to each document type listed
- Select “Add Files,” choose the document from your computer and select “Open”
- Click “Start Upload”
- Once uploaded, close the window

Additional Attachments (not required)

- Click the blue plus button next to Documents
- Select “Add Files,” choose the document from your computer and select “Open”
- From the Document Title list, select “Additional Attachment”
- Click “Start Upload”
- Once Uploaded, close the document window



Attachments

Documents

The following documentation is required:

- Organization's most recent Income and Expense Statement
- Organization's most recent Balance Sheet
- Actual Expenditure Report (click [here](#) for template)

Uploading Instructions:

- Click the "+" next to each document type
- Select "Add Files," choose the document from your computer and select "Open"
- Click "Start Upload"
- Once uploaded, close the document window

Should there be any additional documents relevant to your report that you would like to share, please do so here by following these instructions:

- Click the "+" next to Documents
- Select "Add Files," choose the document from your computer and select "Open"
- From the drop-down select "Additional Attachment"
- Click "Start Upload"
- Once uploaded, close the document window

Income-Expense Statement - Progress Report



Balance Sheet - Progress Report



Actual Expenditure Report - Progress Report



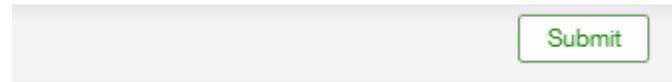
Documents



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Submitting Your Report

- Once you have entered all of your information and uploaded the attachments, click “Save.”
- The “Submit” button will now appear in the bottom right corner, click “Submit.”



- Should there be any empty fields or missing attachments, a compliance warning will appear. You will need to address and save, prior to submitting.
- Once submitted, you will see in real time the transition of the report from you “Upcoming Report” section to the “Submitted Report” section in the Grantee Portal.



After you Submit- What to Expect

- Once your report has been submitted, you will receive an email confirming its receipt.
- A Foundation staff person will reach out to you to touch base about your report and to follow-up with any additional questions as needed. The typical review period is four weeks.
 - Additionally, the report might be sent back to you to gather more information. You will be informed if this happens and what is needed (see next slide).
- If the next payment for your grant is contingent upon the receipt and approval of the submitted report, you should receive payment in approximately 45 days assuming there are no issues documented in the report that will delay the payment.



Report Sent Back

- Should the review of your report bring up requests from the Foundation, the report will be sent back to you.
- Examples of requests include:
 - Updating or missing required documents
 - More information on milestones or another narrative section
- You will receive an email stating that the report was sent back for more information
- The report will be located in the “Report Revisions Needed” section of the Grantee Portal



Questions?

Resources

- Sample Report Guide
- Frequently Asked Questions
- www.coloradohealth.org

For all other questions, please contact:

Sarah Hughes

Grants Management Associate

303-953-3600, shughes@coloradohealth.org

Sara Guillaume

Senior Director of Grantmaking Operations

303-953-3600, sguillaume@coloradohealth.org

OR email:

grants@coloradohealth.org



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