Reporting Guidelines and Expectations

Community Health Improvement (CHI)
Site Grant Program
Department of Population Health

Fahe

July 1, 2022-June 30, 2023

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Contacts and Schedule

Ballad Health Department of Population Health Contacts

Name	Title	Email	Phone Number
Emily Wells	**Community Health Improvement Specialist & CHI Project Officer**	**Emily.B.Wells@BalladHealth.org**	**615-585-6348**
Rachel Stiltner	Senior Community Engagement Specialist	Rachel.Stiltner@BalladHealth.org	423-946-0935
Casey Carringer	Director of Clinical Engagement	Casey.Carringer@BalladHealth.org	865-696-7776
Paula Masters	Vice President of Health Programs	Paula.Masters@BalladHealth.org	423-302-3085

Fahe Contact

Name	Title	Email	Phone Number
Jackie Weiss	Member Services Manager	jackie@fahe.org	859-228-2143 Cell: 859-248-6076

Reporting Schedule

Each CHI Site must submit 3-month, 6-month, 9-month, and Final Progress Reports to the CHI Project Officer <u>by 5:00 PM</u> on each deadline listed in the table below.

Preferably, reports are submitted by simply updating each relevant document found in the CHI Site's SharePoint Folder. Alternatively, if needed due to technology issues, a CHI site may email the required documents to the CHI Project Officer.

Each CHI Site must use the templates and format provided by the CHI Project Officer unless it has received written permission to use an alternative. The following schedule shows when each report is due:

Report	Period	Deadline
3-Month Report	*7/1/2022-9/30/2022*	***10/14/2022***
6-Month Report	*10/1/2022-12/31/2022*	***1/13/2023***
9-Month Report	*1/1/2023-3/31/2023*	***4/14/2023***
Final Report	*4/1/2023-6/30/2023*	***7/14/2023***

Definitions and Terminology

| Inputs/Resources | → | Activities | → | Outputs | → | Outcomes |

[Community Toolbox Logic Model](#):
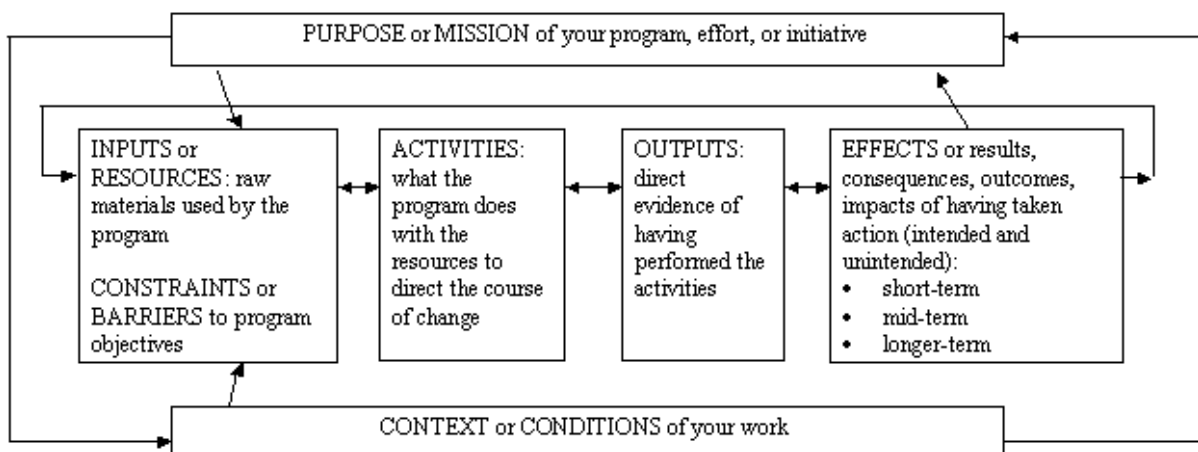
Inputs/Resources are things like staff time, materials, technology, partnerships, etc. that are put into a program. CHI grant funding, the CHI Project Officer's time and capacity, opportunities for networking and collaboration, and other benefits that come with being a CHI site are also examples of inputs/resources.

Activities are what should be included in your implementation or work plan. They are the action items that are needed for your program to occur. Activities are carried out using the inputs/resources you have.

Outputs are your ongoing performance measures that you will be asked to report on for Quarters 1-3. These are measures that come from having performed activities. This is where you measure services rendered.

Outcomes (seen listed in the image above as Effects) are the consequences of the outputs, and these are the measures of success that you will be asked to report on (at minimum) for Quarter 4. Outcome measures should show the results of your program. Outcome measures are not simply what services you rendered; they are a measure of the impact those services had on the recipients. This is where the population health metric(s) and/or Social Determinants of Health that you agreed to address with your CHI program should be measured.

The CHI Project Officer can help you identify which components of your program fall into each of these categories and provide guidance and support for your data collection plans and reporting goals.

Quarterly Reporting Guidelines and Expectations

Section 1: Narrative Report

Using the template provided in your SharePoint Folder (click here) for each quarter, respond to the following questions to complete the narrative component of the quarterly report. The questions are also listed below for your knowledge and review.

Please respond to the following for Quarters 1 – 3 Reports:

- Describe your major accomplishments during this quarter. Please include any partnerships with other organizations that played a key role in your success and describe administrative, organizational, clinical, financial, and/or technological accomplishments.

- Describe any significant barriers faced in achieving your goals and describe the strategies you used or plan to use to overcome them. Please include any significant changes that occurred during this quarter of the project and why those changes occurred.

Please respond to the following for the Final (Q4) Report at the end of the grant period:

- Were your goals and objectives of this CHI Site project met? Why or why not?

- What were you able to accomplish with the CHI grant that you would not have been able to accomplish otherwise? Describe the services, functions, and/or benefits created as a result of this CHI grant.

- Please provide a story or two about how your program made a difference in at least one of the following:
  - Your target population/area
  - Your organization or consortium/coalition
  - Your community
  (*Please do not use actual individuals' names for community members/clients/patients*)

- Provide your organization's "lessons learned" from this grant period. Would you change anything to make the program more successful in the future?

- What are your plans for the program moving forward? Do you hope to continue this project, and if so, do you have plans to scale this project (either by more deeply serving existing clients or expanding to serve more clients)?

Section 2: Anonymous Feedback

In addition to the Narrative Report, you also can provide anonymous feedback on your experience with the CHI Site Program and the CHI Project Officer during this grant cycle via a Google Form. This is required as part of the Final Report (Q4) but also open throughout the year. We welcome and value your feedback and will use your responses to improve the CHI program!

Please provide anonymous feedback about the CHI Grant Program at any time but at least once for the Final (Q4) Report at the end of the grant period.

- Google Form Link: https://forms.gle/f15r8WvMSjfhhvVi6

- This form will be open for responses throughout the year and feedback can be given at any time. You can also submit feedback multiple times.

- Feedback can also be given directly to the CHI Project Officer during monthly check-in meetings or via email at any time.

- If any issues arise that you would like to discuss with someone outside of the CHI Project Officer during the grant cycle, please contact Rachel Stiltner, Senior Community Engagement Specialist, at Rachel.Stiltner@BalladHealth.org or 423-946-0935.

Section 3: Data Report

All data will be tracked and submitted using the Excel workbook template provided in your SharePoint Folder (click here). This is a separate file from the Narrative Report. You will update the same CHI Quarterly Data Report for each quarter. Below you will see short descriptions and expectations for each tab seen in the CHI Quarterly Data Report.

Tab 1: Site Overview

This tab must be updated for the Quarter 1 report. It should also be updated for any additional quarter reports if the information changes. Use this to describe your service area, service population, partnerships, and more.

Tab 2: Demographic Report (Unduplicated)

This tab should be updated each quarter. This should be the unique, unduplicated number of individuals served this quarter broken down by race/ethnicity, age, and insurance status (if applicable). To the right of each Quarter's Total Served column, there is space to list the number of individuals who unenrolled from your program. A reason for unenrollment is not required, we simply want to know how many people are no longer in the program from one quarter to the next, in order to track an accurate number of unique individuals for the year.

Tab 3: Expense Report

This tab should be updated each quarter. Please provide a simple, itemized expense report detailing how much of your budget for the grant cycle has been spent. You can use the template provided on this sheet, or you can copy and paste your budget into the sheet to use for tracking this.

Tab 4: Performance Measures (Outputs)

This tab should be updated each quarter. Based on your implementation or work plan, in Column B, enter each Objective/Goal for the project. These are the activities you are performing.

 For Output Measure Definition (Column C), enter a description of the measure that will be used as evidence that the activities are performed. This can be quantitative (i.e. include counts, percentages, or levels) or qualitative (i.e. describe a condition, a result, or a status). There can be multiple Output Measures for one Objective/Goal.

In order to know if the total goal for a measure is met, please list the baseline in Column D. The baseline is the starting place for this measure at the beginning of Quarter 1. For example, this may be a baseline of 0 if you are measuring new enrollments or people served, or it could be a different value if you have existing recipients of your services.

Tab 5: Results and Impact (Outcomes)

At a minimum, this tab must be updated on the Final Report. Some projects will have outcome measures earlier and should report on them during any applicable quarter report. Measuring at least one outcome from the project is the goal for all CHI sites.

The CHI Project Officer will work closely with you to provide guidance and support for your data collection plans and reporting goals along with any technical assistance needed when using the CHI Quarterly Data Report.

Section 4: Data Visualization and Additional Attachments

Please include any relevant charts or data visualizations that reflect the status or success of the program. Please also include any relevant photos of activities that have been completed and depict the program's success to date. These should be included with all Quarter Reports 1-4, if available.

These can be submitted one of two ways:
- Option 1: Upload these attachments as separate files into the correct Quarter Report folder in SharePoint.
- Option 2: Copy and paste these items into the Narrative Report document for the correct quarter.