June 2020
HCAT
Orientation
Sections

Part A
• Time: (30 minutes)
• Audience: All grantees (both new and returning).
• Content: Information unique to the 2020-2023 grant period.

Part B
• Time: (60 minutes)
• Audience: New HCATs (have fiscal representative present) or new staff. Staff from returning HCATs may remain for this section if they would like a refresher.
• Content: Information about budgeting, workplans, reports, etc.
Orientation Agenda

Part A
- Overview and Welcome
- Impact of COVID-19
- What’s New?
- Questions

Part B
- About VFHY/Terms
- Reporting
- Site Visits/Changes and Revisions/Legislative
- Grant Payments
- Grants Portal
- Evaluation
- VFHY Grants Administration Notebook
- Conclusion/Questions
Welcome!
Impact of COVID-19 (Programming)

Flexibility
• Changing Workplans
• Changing Budgets
• Timeline
• Force Majeure

Clear Communication
• From VFHY

Next Steps
• I need to make some changes. What do I do?

Due Dates
• Unchanged
Impact of COVID-19 (Resources)

Peer Partners
- Solutions from HCATs around Virginia that minimize in-person interactions.
- Google Doc
- Examples:
  - Switching from Community Garden to Garden to Go
  - Switching from traditional 5K to a virtual 5k
  - Switching from in-person farm education to video series
  - Etc.

Catchafire
- Change Management Coaching
- Flexible Marketing Strategy Support
- Flexible Social Media Support
- Remote Team Strategy
- Tech Systems Set Up
- Etc.
What’s New (Health Resources)

**Rev Your Bev:** [https://revyourbev.com/](https://revyourbev.com/) A statewide movement to improve the health of all Virginians by encouraging people to drink more water.

**Share the Air:** [https://sharetheairva.com/](https://sharetheairva.com/) Join Virginians across the Commonwealth in standing up for clean and healthy outdoor spaces.

**FeedVA:** [https://feedva.org/](https://feedva.org/) Exploring Virginia trends in hunger, food access, and health

**Spring 2021 Conference:** Childhood Obesity/Tobacco Prevention Date TBD
What's New? (Legislative Outreach and Reporting)

- More Information will be Coming Soon
  - Likely Scenarios

Upcoming Due Dates:
- **July 15** - Acknowledgement form (for Grants Manual)
- **August 30** - July invoice
- **Oct 15** - 1st quarterly report
What’s New
(Training)

Trainings offered throughout the year.
• Typically cost $25 per participant
• Free of charge through August
• https://www.vfhy.org/trainings/

Trainings Include:
• Nutrition, Obesity and Physical Activity,
• Community Team Development & Sustainability,
• Program Development & Assessment,
• Professional & Organizational Development,
• Youth Advocacy, Development & Engagement;
• Classroom Management,
• Proposal Writing & Grant Management,
• Technology, Media and Public Relations Education

Charlie McLaughlin, Jr.
Training and Resource Manager
804-786-2279  cmclaughlin@vfhy.org
What’s New (Virginia Youth Survey (VYS))

Partnership between VDH, VFHY, and VDOE

The Youth Risk Behavior Surveillance System (YRBSS) monitors six categories of health-related behaviors that contribute to the leading causes of death and disability among youth and adults

Trends by Region
Part A

Questions?
History

Created in 1999 by the Virginia General Assembly as a result of the Master Settlement Agreement to prevent and reduce youth tobacco use in Virginia.

In 2009, the General Assembly expanded our mission to include the prevention and reduction of childhood obesity.

In 2017, the General Assembly further expanded the VFHY mission to include the prevention and reduction of substance use.
Regional Grant Administrators (RGAs)
- Judy Sparrow – Southeast Region
- Jenny Martin – Southwest Region
- Lisa Brown – North Region
- Terri-ann Brown – Central Region

Update your RGA as needed regarding:
- Project implementation schedules
- Staff changes – project and fiscal
- Project changes
- Successes AND barriers
- Budget questions, concerns or problems
Marketing

Campaigns targeting youth obesity prevention & tobacco use prevention:

- Rev Your Bev
- 24/7 (www.247campaignva.com)
- Youth Engagement www.ystreet.org
- Y-Street Mini-grants - Y Street partner schools receive up to $2,000 for their club or school while simultaneously tackling important issues related to tobacco, nutrition, and obesity prevention.
- Television and Radio Advertisements

Danny Saggese, Director of Marketing
dsaggese@vfhy.org
Hannah Robbins, Marketing Specialist
hannah.robbins@vfhy.org
Communication

Get the word out about your grant-funded work!
- Website, Facebook, Twitter, Instagram
- HCAT Grantee Facebook Group
- Highlight activities, make announcements, share data, have fun!
- Issue Press Releases (help available from Brennan Smith, VFHY public relations coordinator, bsmith@vfhy.org)

Follow VFHY
- VFHY Website - www.vfhy.org
- Follow us on Twitter (@HealthyYouthVA)
- Follow us on Instagram (@healthyyouthva)
- “LIKE” us on Facebook
- Sign up for our email list @ www.vfhy.org
VFHY Common Terms

Grants Portal – the online platform where grantees completed their proposal and will submit reports and revisions.

Follow Up – Grantees will be assigned Follow Ups in the grants portal. Follow Ups may be quarterly reports, grant revisions, legislative.

Grants Administration Notebook – New HCAT grantees were provided with a binder to use to manage grant materials.

Grants Administration Manual – This document will be provided post-orientation. It is a process manual or a "how-to" for managing the VFHY grant.

Local Evaluation – VFHY refers to "local evaluation" as the evaluation that grantees conduct for their projects. Grantees included evaluation strategies in their proposals.

Statewide Evaluation – Any evaluation undertaken by VFHY. Grantees may be asked to participate in statewide evaluation activities.
Reporting
Found in grants portal

- Acknowledgement Form due July 15
- VFHY Quarterly Report
- Final Report
- Local Evaluation Report

Found on VFHY Website

- VFHY Legislative Contact Information Form
- VFHY Invoice/Reimbursement Request Form
- Budget Revision Request Form (as needed)
Year 1 Report Dates

- 1st Quarter - October 15, 2020
- 2nd Quarter - January 15, 2021
- 3rd Quarter - April 15, 2021
- 4th Quarter - July 15, 2021

Please mark your calendars!

- The 4th Quarter Report will include a Year End Summary. Use this as an opportunity to provide input and feedback to VFHY.

- Local Evaluation Report is due by July 31 each year.

- A Final Report, with an overall analysis of the grant and HCAT projects will be required at the end of the grant period (July 15, 2023).
VFHY may order changes within the general scope of the contract at any time by written notice to the Grantee.

The parties may agree in writing to modify the scope of the contract.

Budget revisions may be requested utilizing the Budget Revision Request form. Complete all areas and submit form to Regional Grants Administrator electronically. *If less than $250, a one-time line item change can be made without prior approval by VFHY, during the first three quarters of the grant cycle.*

Provide details which fully justify the need to revise the budget.

Only one budget revision request is allowed per fiscal year and must be submitted before the end of the third quarter (March 31st of each grant year).
VFHY will conduct periodic site visits with all grantees. They will occur in the 2\textsuperscript{nd} or 3\textsuperscript{rd} quarters of the first year. Grantees should be prepared and ready to discuss all facets of their grant-funded project.

Site visits are used to:
- Review project status and progress toward objectives
- Review grant project management and organization
- Review human resources
- Review fiscal oversight
- Review VFHY Grants Administration Notebook
- Show off your successes and discuss any barriers
- Ask questions or request assistance
- Stay connected with VFHY

Participants
- Grant coordinator
- Fiscal staff
- VFHY RGA
Legislative Outreach

A great way to show off your good work and discuss the importance of VFHY grant funding!
<table>
<thead>
<tr>
<th>GRANTEE</th>
<th>Address</th>
<th>Compendium Program(s) (Tobacco Grantees) Project (HCAT Grantees)</th>
<th>Number of Program Participants (if applicable)</th>
<th>State Delegate Name Email Address District Number</th>
<th>State Senator Name Email Address District Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Preschool</td>
<td>123 Main Street</td>
<td>Alf’s Pals</td>
<td>100</td>
<td>Jennifer B. Boyko</td>
<td>Janet D. Howell</td>
</tr>
<tr>
<td>SAMPLE TOBACCO</td>
<td>Fairfax, VA 22222</td>
<td></td>
<td></td>
<td><a href="mailto:DeliBoyko@house.virginia.gov">DeliBoyko@house.virginia.gov</a> 85</td>
<td><a href="mailto:district32@senate.virginia.gov">district32@senate.virginia.gov</a> 32</td>
</tr>
<tr>
<td>ABC Head Start Center</td>
<td>123 Center Avenue Richmond, VA 23219</td>
<td>Preschool produce initiative</td>
<td>50</td>
<td>John Smith</td>
<td>Patricia Jackson</td>
</tr>
<tr>
<td>SAMPLE HCAT</td>
<td>23219</td>
<td></td>
<td></td>
<td><a href="mailto:doljsmith@house.virginia.gov">doljsmith@house.virginia.gov</a> 87</td>
<td><a href="mailto:District33@senate.virginia.gov">District33@senate.virginia.gov</a> 33</td>
</tr>
</tbody>
</table>

Rev. 02/2020
Grant Payments: Submitting Invoice/Reimbursement Forms
Method of Payment

- Submit invoices on a monthly basis via e-mail to your RGA, no later than 30 days following the month in which expenses were incurred.

- These are reimbursement grants. You cannot “prepay” for items in your budget. For example, you cannot request payment for services, materials or activities that will be purchased or take place in the future.

- Establish a system to confirm payment receipt with your finance department.
• Submit a W-9 to VFHY and register in eVA to ensure prompt payment (https://www.eva.virginia.gov). You will also upload W-9 into eVA.

• Establish electronic payments by enrolling in the Electronic Data Interchange (EDI) project with the Commonwealth of Virginia’s Department of Accounts.

• If you have questions about electronic payments, contact our Business Manager, Wilma Jordan at 804-786-7409 or wjordan@vfhy.org.
Use only the VFHY Invoice form provided. Do NOT use previous versions of the VFHY Invoice.

VFHY reserves the right to request all supporting documentation for monthly expenditures. Grantees must retain all receipts. Up to three Invoice Verifications may be conducted each year of the grant. Grantees will submit both the form and the receipts and supporting documents for a requested month.

Ensure that staff who submit invoices have a copy of the approved budget for verification of correct line items.

The invoice form is an Excel workbook and is to be submitted in its entirety. If you have any problems, contact your RGA.

Payment is processed within 30 days from VFHY receipt.
Indirect costs have a separate line item in your VFHY budget and on the invoice form.

Do not request more than 10% of the monthly VFHY personnel costs expended for indirect costs. (If you requested less than 10% in your proposal, use that figure.)

**For example:**

July 2020 VFHY personnel = $1320
July 2020 indirect = $132
Submitting Invoices

E-mail each monthly invoice with only the month and the word “INVOICE” in the subject line to your RGA.

Example email subject: "July invoice"

Do not include other attachments or correspondence when submitting an invoice.

Retain all receipts and supporting documentation for expenditures by month in the Grants Administration Notebook. Only the invoice form itself is submitted to VFHY.

Let’s take a look at the form...
### Virginia Foundation for Healthy Youth - Invoice/Reimbursement Request

#### HEALTHY COMMUNITIES ACTION TEAM GRANT

<table>
<thead>
<tr>
<th>Item</th>
<th>Program/Contract Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td></td>
</tr>
<tr>
<td>Consulting</td>
<td></td>
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<tr>
<td>Travel</td>
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<tr>
<td>Mailing/Spame</td>
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<tr>
<td>Materials</td>
<td></td>
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<tr>
<td>Other Costs</td>
<td></td>
</tr>
<tr>
<td>Indirect Costs</td>
<td></td>
</tr>
</tbody>
</table>

**Grant Contract Number:**

**Grant Contract Period:** JULY 20 - JUNE 23

**Object Code 1452**

Expenditures (Please round off to the Nearest Dollar. Do Not Change any cells that are filled.)

TOTAL: £
Virginia Foundation for Healthy Youth - Invoice/Reimbursement Request

HEALTHY COMMUNITIES ACTION TEAM GRANT

Check here if this is your final reimbursement request for the grant year:

Grantee Name: [Blank]

Address: [Blank]

Project Title: [Blank]

Type Name: [Blank]

Title: [Blank]

Telephone: [Blank]

Email Address: [Blank]

Expenditures (Please Round Off to the Nearest Dollar):
Do Not Change any cells that are Red!

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Program Contract Amount</th>
<th>Reimbursement Request to Date</th>
<th>Expenditures for Report Period</th>
<th>Remaining Amount Available</th>
</tr>
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<tbody>
<tr>
<td>Personnel</td>
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<tr>
<td>Consultants</td>
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<tr>
<td>Travel</td>
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<tr>
<td>Rental Space</td>
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<tr>
<td>Materials</td>
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<td>TOTAL</td>
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</tbody>
</table>

Date: [Blank]

VPhY Business Manager: [Blank]

Date: [Blank]
Grants Portal: Submitting Reports and Other Forms
Most reporting is done through the grants portal, including:

- Proposal
- Acknowledgement Form
- Quarterly and Final Reports
- Modification Request(s)
- Local Evaluation Report
- Others TBD

Each organization is provided with a label for writing your email address and password (in the Notebook). This is needed as a reference for staff who will be accessing the grant portal.
Grants Portal Login

Make sure there is a sticker on the inside of your notebook to place your email address and password.
Organization Dashboard Page
Follow-up Save or Submit

Save and return later to complete

Submit when complete
Quarterly Reports

- “Follow-up” is the online term for required reporting.
- You will receive a notification two weeks prior to the deadline.
- If not submitted by the deadline you will receive a past due reminder.
- The form can be started and saved for later completion.
- Once your RGA approves the report, it is complete and will attach to your grant file. You can view it later, but you cannot modify it.
VFHY uses a variety of evaluation strategies to monitor and improve our programs.

Virginia Youth Survey

Statewide Grant Evaluation Activities

Monitor Local Evaluation Outcomes

- Determined by the grantee
- Described in the original proposal
- Local Evaluation Report is submitted at the end of the grant year to provide results to VFHY, and to share with your community, board members, etc.
The VFHY Grants Administration Notebook
Notebook Sections

- VFHY Orientation Materials
- VFHY Grants Administration Manual
- Proposal
- Budget
- Workplan - Component I
- Workplan - Component II
- Evaluation
- Quarterly Reports
- Invoices
- Project Information
- Legislative Contact Information
- Resources
1. Orientation Materials

2. VFHY Grants Administration Manual

- The orientation slides and Grants Administration Manual will be available after orientation to download from vfhy.org.
- Download and print these documents from the website.
- Thoroughly read and understand all terms and conditions.
- Complete the Acknowledgement Follow Up through the grants portal.
AUDIT – “Grantee hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment…”

“…The Contractor (Grantee) shall utilize the Grants Administration Notebook provided by VFHY to maintain all appropriate records.”

SUBCONTRACTS - “No portion of the work shall be subcontracted without prior written consent of the purchasing agency”

SWaM Certification - If eligible, any Offeror that is a for-profit organization should register with the Virginia Department of Minority Business Enterprises (DMBE) as a SWaM Initial Certified Business (Small, Woman and Minority-owned Businesses) and notify the assigned VFHY Regional Grants Administrator.
3. Proposal

Print a copy of your grant proposal from the grants portal.

Add it to your VFHY Grants Administration Notebook.

Share a copy with all grant-related staff (project and fiscal).
4. Budget

If changes are requested or made, keep copies in this section as well.

Budget Revision Request form copies will go in this section as well.

Make sure you have saved your budget file electronically for future use.
Print copies of your Component I and Component II Workplans from the grants portal and include all revisions.

Add them to your VFHY Grants Administration Notebook.

Share a copy with all grant-related staff.
7. Evaluation

File all evaluation related documents.

Items would include evaluation tools (surveys, questionnaires, pre/post-tests), instructions and evaluation reports.
8. Quarterly Reports

You are welcome to print and file quarterly reports here (but the original copies are in the grants portal).

Also include final reports in this section.

Use Print Packet option for printing your reports.
9. Invoices

Copies of all submitted invoices are filed in the Notebook.

Include copies of all backup fiscal documentation (receipts, vendor invoices, time records, etc.).
**Virginia Foundation for Healthy Youth - Invoice/Reimbursement Request**

**HEALTHY COMMUNITIES ACTION TEAM GRANT**

- **Grantee Name:** [Redacted]
- **Grant Contract Number:** 0
- **Grant Contract Period:** JUL 20 - JUNE 23
- **Month Ending:** July 20

**Expenditures (Please Round Off to the Nearest Dollar):**

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</table>

**AMOUNT REQUESTED:**

- $ -

**Object Code 1452**

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**Date**

**VFHY Business Manager**

**Date**
10. Project Information

All items related to development and implementation of projects and programs:

- Policy documents
- Partner Profile Agreements
- Membership information
- Meeting minutes
- Other documents related to project
11. Legislative Contact

12. Resources

Legislative Contact Information
- Copies of submitted contact forms
- Copies of letters
- Any additional items related to visits or outreach

Resources
- Additional items that aid in the progress of your grant and its impact
Final Thoughts

Stay current with your grant management requirements.

COMMUNICATION: Stay in touch with your RGA with good and not-so-good news.

Provide VFHY feedback on our processes anytime.

Enjoy your time with the grant!
And....
Thank you for all you do to help the youth of Virginia to live healthier and happier lives!

Questions?