Common Good Initiative Investment Webinar

December 3, 2018
We, Allegany Franciscan Ministries and Trinity Health, serve together in the spirit of the Gospel as a compassionate and transforming healing presence within our communities.

Allegany Franciscan Ministries is guided by this mission and rooted in the tradition and vision of the Franciscan Sisters of Allegany.
Lord,
A new week is beginning...
already I feel the rush.

Slow me down, Lord.

Slow me to the beat of Your heart.

I think of Your words that say
those who wait on You
will run and not grow weary--
and I remember that rest
is not about lack of motion
but rather moving forward with You
so that activity is a blessing not a burden.

I will run this week--there is much to do
but help me do so in a way
that keeps me by Your side.

Waiting and working,
only You could tie those together.

Please do so for me today.

Amen.
Staff Team

Cheri Wright-Jones
Carla Batts
Kathie Hardy
Erin Baird
Lise Landry Alives
Eileen Coogan
Daniel Gibson
Brittney Frazier
Upendo Shabazz
A Values Based Organization

Allegany Franciscan Ministries is a non-profit Catholic organization with nine colleagues, and offices in Tampa, West Palm Beach, and Miami. Allegany Franciscan Ministries grew out of the health care ministries of the Franciscan Sisters of Allegany, New York, and is a member of Trinity Health.

Allegany provides grants and resources primarily in three regions of Florida. Celebrating its 20th anniversary in 2018, Allegany has invested over $92 million to almost 1500 organizations to improve access to health and health care. In 2014, while continuing its traditional grant-making activities, Allegany launched the Common Good Initiative.
The Common Good Initiative is designed to mobilize communities towards better health and wellness through community engagement, a long-term commitment of resources, and increased collaboration of residents and stakeholders.

Overtown

Lincoln Park

Wimauma
Common Good Initiative

Allegany Franciscan Ministries created the Common Good Initiative to build healthier, safer, and more connected places where everyone thrives. Community involvement is a deeply held value for the Common Good Initiative. “The community” includes anyone who lives, works or volunteers in the community – Overtown, Lincoln Park, or Wimauma.

Residents and stakeholders serve on each community’s Council for the Common Good, which, in partnership with the Allegany Franciscan Ministries’ regional vice president, guides the development, implementation, and investments of the initiative.
Allegany Franciscan Ministries has committed significant resources - human, financial, social and spiritual - to the initiative. Other philanthropic, public, private, non-profit, and faith-based organizations are invited to come together, leveraging resources. Over $6.6 million has already been invested by Allegany.

The initiative anticipates supporting this work through 2022.
Types of Funding Opportunities

These could include:
• A traditional RFP
• Contracted services
• Mini grants
• Proactive partnerships
• Loans
• A myriad of other innovative funding mechanisms

As appropriate, opportunities will be announced when they become available.

Community members may also reach out to Allegany Franciscan Ministries Regional Vice Presidents and monitor updates through the Common Good Initiative pages on the website, www.afmfl.org.
Reporting Forms & Expectations

Progress Report

I. Success Measures Form (Application)

II. Project Budget Summary Form (Application)

III. Program Report Success Measure Form (Report)

IV. Financial Report Form (Report)

V. Agreement/Contract and Audits (may be required)
Grant Reporting

At the time a progress report is due, the Organization is expected to have spent at least 80% of the payments made. Once reported and verified, Allegany Franciscan Ministries will release the next payment.

If the Organization has not spent 80% of the payments made, but anticipates that the money will be spent within 30 days, the Organization must notify the appropriate staff person with an explanation. Then after, resubmit the Financial Report Form and the completed report indicating the progress made.

For requests longer than 30 days, a separate written request for an extension and an additional report will be required.
## Success Measures Form (Application)

**Allegheny Franciscan Ministries**

**SUCCESS MEASURES FORM**

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Agency A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year: From (month/year):</td>
<td>July 1, 2018</td>
</tr>
<tr>
<td>To (month/year):</td>
<td>June 30, 2019</td>
</tr>
</tbody>
</table>

### Outcomes

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Indicators</th>
<th>Activities</th>
<th>Measurement plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients will increase awareness of health status and the importance of early disease detection.</td>
<td>75% of 200 participants (150 participants) will learn their health status by agreeing to be screened for targeted disease.</td>
<td>Conduct outreach and education workshops; provide health screenings with 5 minutes results; provide health navigation and counseling; provide linkage to appropriate health care;</td>
<td>Health Screening Tool Client Files/Case Notes Client database reports</td>
</tr>
<tr>
<td>Patients with abnormal/inconclusive screenings will have diagnostic test within 30 days of initial screening.</td>
<td>70% of estimated 50 participants (35 participants) with abnormal/inconclusive screening will receive a diagnostic test within 30 days of the initial screening.</td>
<td>Work with LabCorp for test results; provide health navigation and counseling around results; schedule diagnostic tests; provide ongoing linkage, follow-up care and case management as needed.</td>
<td>Health Screening Tool Client Files/Case Notes Client database reports</td>
</tr>
</tbody>
</table>
| Become an accredited organization who can bill for Medicaid services | Receipt of Medicaid license by 6/30/19. | Step 1: Gap analysis completed by 10/31/18
Step 2: Timeline of Critical Activities for conformance completed by 11/30/18
Step 3: Identify and subcontract Director by 3/31/19
Step 4: Complete licensure application by 4/30/19
Step 5: Complete accreditation tour by 4/30/19 | Project Timeline of Critical Activities will be created in early activities and inform the measurement points of each step of the plan. Project Director to lead bi-weekly conferences with project staff and sub-contractors (Expert Consultant & Medical Director) will occur throughout project. |

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*complete one page – and one page only – per year of grant*
## Allegany Franciscan Ministries - 2018-2019 Common Good Initiative

### PROJECT BUDGET SUMMARY FORM - YEAR 1

**Organization Name:** ___________________________  
**Project Name:** ___________________________  
**FROM (date):** ________________  **TO (date):** ________________

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Total Project Budget (A+B+C+D)</th>
<th>Sources of Funding</th>
<th>Source B:</th>
<th>Source C:</th>
<th>Source D:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personnel (salaries, wages, benefits, payroll taxes etc for all personnel involved in project)</strong></td>
<td>0</td>
<td>Allegany Franciscan Ministries</td>
<td>insert name of funding source</td>
<td>insert name of funding source</td>
<td>insert name of funding source</td>
</tr>
<tr>
<td><strong>Equipment (computers, furniture, etc., less than $3,000 per item)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supplies</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Occupancy (rent, mortgage, utilities, telephone, internet, etc. assigned as project expense)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Local Travel (mileage, tolls, parking for regular local travel)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Training (staff development, conferences, long distance travel)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Design, Printing &amp; Postage</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Capital (Buildings, vehicles, equipment $3,000 or more per item)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Purchased Services (consultants, legal, accounting services, etc.)</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>0</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
**Program Report Form (Application)**

**Organization Name:** Agency A  
**Project/Program Name:** Program XYZ

**Reporting Period (Date from/to):** 7/1/2018 – 12/31/2018

This form is based on agreed upon outcomes, indicators and measurement plan in your Success Measures document.

<table>
<thead>
<tr>
<th>OUTCOMES</th>
<th>INDICATORS % AND #</th>
<th>RESULTS TO DATE</th>
<th>CHALLENGES/LESSONS LEARNED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients will increase awareness of health status and the importance of early disease detection.</td>
<td>75% of 200 participants (150 participants) will learn their health status by agreeing to be screened for targeted disease.</td>
<td>80% of 80 participants (64 participants) were screened and received their test results.</td>
<td>Though we have met our percentage goal, our numbers of participants reached through outreach has been less than expected due to recent tropical storm. Agency A will be conducting additional outreach efforts in the coming months.</td>
</tr>
<tr>
<td>Patients with abnormal/inconclusive screenings will have diagnostic test within 30 days of initial screening.</td>
<td>70% of estimated 50 participants (35 participants) with abnormal/inconclusive screening will receive a diagnostic test within 30 days of the initial screening.</td>
<td>60% of 65 participants (39 participants) with abnormal/inconclusive screening will receive a diagnostic test within 30 days of the initial screening.</td>
<td>The number of abnormal screening results has far surpassed our expected number in the first 6 months. Due to this high number of required appointments, staff required more time to coordinate appointment schedules. Additional staff or volunteers may be required to meet this outcome.</td>
</tr>
</tbody>
</table>
| Become an accredited organization who can bill for Medicaid services | Receipt of Medicaid license by 6/30/19. | Step 1: Gap analysis completed on 9/30/18  
Step 2: Timeline of Critical Activities for conformance completed by 12/15/18  
Step 3: Currently interviewing for subcontractor | Our accreditation project seems to be on target for our timeline. No challenges to report at this time. |
# Allegany Franciscan Ministries
## Financial Report Form

**Organization Name:** Agency A  
**Project/Program Name:** Program XYZ  
**Grant Period Per Agreement (Date from/to):** July 1, 2020 - June 30, 2021  
**Total Grant Amount:** $50,000  
**Total Grant Funds Received To Date:** $30,000  
**Total Grant Expenditures To Date:** $25,000  
**Total Grant Expenditures As % Of Funds Received:** 69%  
**Reporting Period (Date from/to):** July 1, 2020 - December 31, 2020  
**Total Grant Expenditures This Reporting Period:** $5,000  
**Total Grant Expenditures To Date:** $25,000

### Budget Category

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Approved Budget Year 1</th>
<th>Approved Budget Year 2 (if applicable)</th>
<th>Approved Budget Year 3 (if applicable)</th>
<th>Total Grant Expenditures This Reporting Period</th>
<th>Total Grant Expenditures To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel (salaries, wages, benefits, payroll taxes etc. for all personnel involved in project)</td>
<td>$75,000</td>
<td>$75,000</td>
<td>$25,000</td>
<td>$25,000</td>
<td></td>
</tr>
<tr>
<td>Equipment (computers, furniture, etc., less than $5,000 per item)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupancy (rent, mortgage, utilities, telephone, internet, etc. assigned as project expenses)</td>
<td>$12,000</td>
<td>$12,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td></td>
</tr>
<tr>
<td>Local Travel (mileage, tolls, parking for regular travel)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training (staff development, conferences, long distance travel)</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Design, Printing &amp; Photography</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital (buildings, vehicles, equipment $3,000 or more per item. Not an allowable expense for grant funds.)</td>
<td>$13,000</td>
<td>$12,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Purchased Services (consultants, legal, accounting services, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$100,000</strong></td>
<td><strong>$100,000</strong></td>
<td><strong>$0</strong></td>
<td><strong>$30,000</strong></td>
<td><strong>$30,000</strong></td>
</tr>
</tbody>
</table>

*Yellow = Static information (does not change between reports)*  
*Blue = Cells you may need to update between reports*  
*Green = Linked cells with formulas*
# Allegany Franciscan Ministries

## Financial Report Form (Report)
(expenditures greater than 80%)

<table>
<thead>
<tr>
<th>Project/Program Name</th>
<th>Total Grant Amount</th>
<th>$200,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program XYZ</td>
<td>Total Grant Funds Received To Date</td>
<td>$50,000</td>
</tr>
<tr>
<td>Grant Period Per Agreement (Date from/to):</td>
<td>Total Grant Expenditures To Date</td>
<td>$43,250</td>
</tr>
<tr>
<td>July 1, 2018 - June 30, 2020</td>
<td>Total Grant Expenditures As % Of Funds Received</td>
<td>87%</td>
</tr>
<tr>
<td>Reporting Period (Date from/to):</td>
<td>January 1, 2019 - January 31, 2019</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Approved Budget Year 1</th>
<th>Approved Budget Year 2 (if applicable)</th>
<th>Approved Budget Year 3 (if applicable)</th>
<th>Total Grant Expenditures This Reporting Period</th>
<th>Total Grant Expenditures To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>$75,000</td>
<td>$75,000</td>
<td></td>
<td>$6,250</td>
<td>$31,250</td>
</tr>
<tr>
<td>Supplies</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Occupancy</td>
<td>$12,000</td>
<td>$12,000</td>
<td></td>
<td>$1,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Local Travel</td>
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</tr>
<tr>
<td>Training</td>
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<td></td>
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<tr>
<td>Design, Printing &amp; Postage</td>
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<tr>
<td>Capital</td>
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<tr>
<td>Purchased Services</td>
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<tr>
<td>Other</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$100,000</strong></td>
<td><strong>$100,000</strong></td>
<td><strong>$0</strong></td>
<td><strong>$13,250</strong></td>
<td><strong>$43,250</strong></td>
</tr>
</tbody>
</table>

Yellow = Static information (does not change between reports)  
Blue = cells you may need to update between reports  
Green = locked cells with formulas
Examples for a grant amendment request:

- Changes in the program or project (i.e. late starting date or delay in progress)
- Unanticipated shift in budget items and expenses
- Latest audit being finalized
Who to Contact

Carla Batts: cbatts@afmfl.org; (727) 507-9668 – General Questions & Technical Assistance

OR

Regional Vice President serving your community – Content Questions & Amendments

Daniel Gibson – Miami-Dade
dgibson@afmfl.org; (305) 860-1441

Upendo Shabazz – Palm Beach (Martin, Palm Beach & St. Lucie Counties)
ushabazz@afmfl.org; (561) 802-9013

Cheri Wright-Jones – Tampa Bay (Hillsborough & Pinellas Counties)
cwrightjones@afmfl.org; (813) 685-3232
Contact Information & Social Media

For more information please visit our website at www.afmfl.org or call our main office at (727) 507-9668.

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And REVIEW us on GrantAdvisor.org!