

**Proposition 64
Public Health & Safety
Grant Program**

**Cohort 3 - Grantee
Orientation**

Programmatic Requirements

Communication With All Partners

Ensure the full Project Team and all Project Partners (internal & external) understand:

- ✓ Project Goals and Objectives
- ✓ Project Workplan
- ✓ Project Timelines
- ✓ Project Roles and Responsibilities
- ✓ Key Activities and Due Dates
- ✓ Terms of the Contract



COLLABORATE



Model / Intervention Fidelity

Do you have a mechanism(s) in place to monitor your project for fidelity to the project model(s)?



Do you have method for:

- ✓ tracking youth?
- ✓ tracking measures for other PPAs?
- ✓ quality control?
- ✓ quality assurance?

Occurs throughout the life of the grant project.

Programmatic Requirements

Project Director Calls - Mandatory

- Quarterly
- BSCC & Grant Updates
- Report Outs for:
 - ✓ Program and Fiscal Updates
 - ✓ Accomplishments
 - ✓ Barriers
 - ✓ Data Questions
 - ✓ Networking
 - ✓ Technical Assistance
 - From BSCC
 - From Peers



Key Program Requirements

- ❑ Financial Invoices (Section 5)
 - ❑ One Drive Repository
 - ❑ Submit Quarterly
- ❑ Project File Retention (3 Years Post-Grant)
- ❑ Grantees must make measurable progress toward stated goals and be in full compliance with all contractual requirements
- ❑ Site Visits
 - ❑ Expectations
 - ❑ Sample Form
- ❑ Progress Reports (Section 6)
 - ❑ Submit Quarterly
 - ❑ Updated Form

Monitorings

- ❑ Periodic On-Site Visits
 - ❑ Initial
 - ❑ Technical Assistance
 - ❑ **Comprehensive**
 - ❑ Compliance
 - ❑ Special Event
 - ❑ Close-out



Monitorings

- ❑ Comprehensive Monitoring Visit (CMV)
 - Once During Grant Cycle
- ❑ Understanding First-Hand How the Project Functions
- ❑ Key Project Staff With Partners and Subcontractors
- ❑ Fiscal and Project Documentation Organized and Available
- ❑ Time to Showcase Your Project!

Monitorings

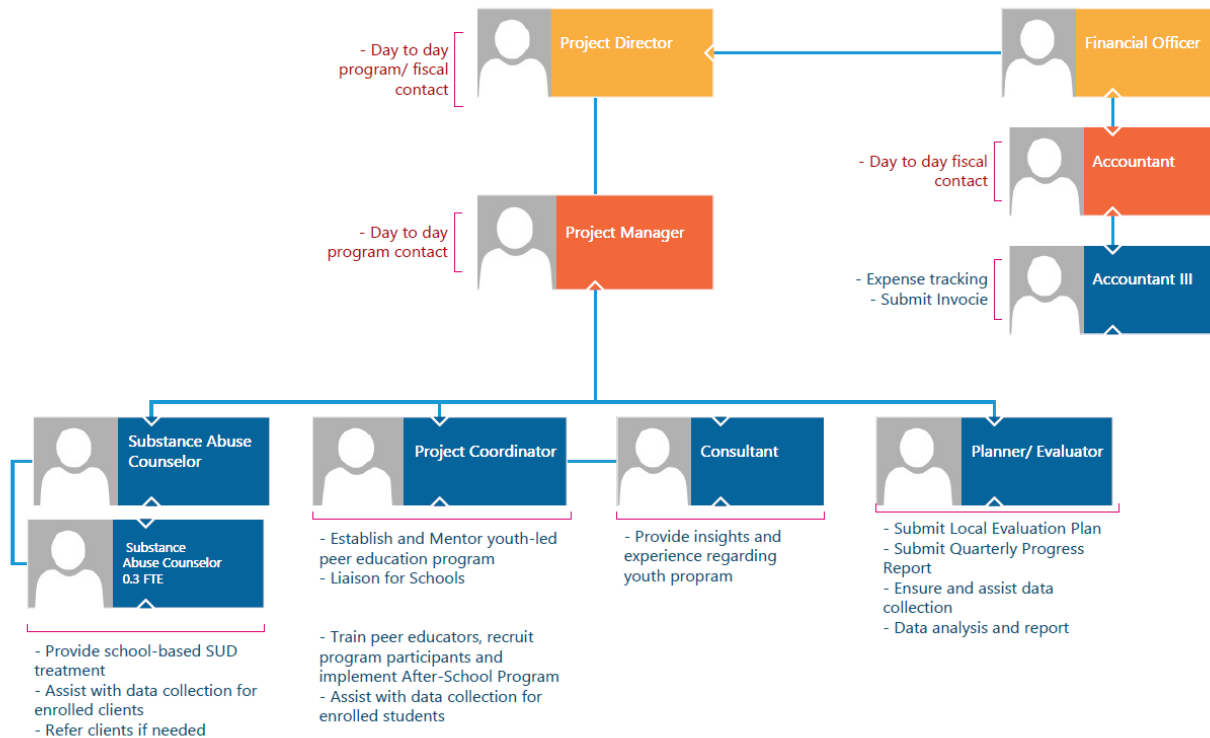
CMV Tool - Highlights

- ❑ Project Specific Organizational Chart
- ❑ Project Specific Duty Statements
- ❑ Non-Discrimination Grievance Process
 - ❑ Employees AND Participants
- ❑ Functional Timesheets
- ❑ Subcontractor Oversight

Monitorings

Project Specific Organizational Chart Sample

Prop 64 Grant Organization Chart



Monitorings

Functional Time-Tracking Sample

DAILY TALLY												
WORKSHEET FOR: <NAME>												
2022												
WEEK 1, Oct 3 - 9	Mon	Activities	Tue	Activities	Wed	Activities	Thu	Activities	Fri	Activities	Sat	Sun
PROGRAM	3		4		5		6		7		8	9
Pay For Success			1.00	QPR work Leg Rpt edit								
Prop 64	8.00	CMV S.Cruz	3.50	Submittable/RFP development	2.50	Submittable/RFP development						
Proud Parenting			2.00	Reapp dev	4.00	Reapp dev & emails						
Medication Assist Tx												
Other (ARG, CalVIP)					1.50	Mtg w/CalVIP FR						
GF (CCP)			1.50	CCP data Website work								
ANNUAL LEAVE / VACATION / SICK HOLIDAY / HOLIDAY CREDIT / ITO												
ALL OTHER (PLP, PDD, JURY DUTY, etc.)												
	8.0		8.0		8.0		0.0		0.0			24.0
WEEK 2, OCT 10 - 16	Mon	Activities	Tue	Activities	Wed	Activities	Thu	Activities	Fri	Activities	Sat	Sun
PROGRAM	10		11		12		13		14		15	16
Pay For Success												
Prop 64												
Proud Parenting												
Medication Assist Tx												
Other (ARG, CalVIP)												
GF (CCP)												
ANNUAL LEAVE / VACATION / SICK HOLIDAY / HOLIDAY CREDIT / ITO												
ALL OTHER (PLP, PDD, JURY DUTY, etc.)												
	0.0		0.0		0.0		0.0		0.0			

On-Site Monitoring Timeframe Guide

PROGRAM MONITORING (SITE VISIT) PREPARATION TOOL			
Monitoring Component	Approximate Timeframe	Who is Involved	Supporting Document and Reviewing Activities
Administrative Review (includes Office for Civil Rights requirements, if applicable)	90 minutes	Project Director and fiscal staff	Review Grant Administration and Audit Guide, subcontracts, grant-specific duty statements, employee timesheets for full-time staff and functional timesheets or time studies for part-time staff (verify salaries and benefits are not claimed under other funding sources), review EEO Policy.
Fiscal Review	90 minutes	Project Director and fiscal staff	<ol style="list-style-type: none"> 1. Budget File: Review official budget file and contents. 2. Invoicing: Review of purchase orders, receipt of goods, subcontracts (to include service provided, fee/service, time allocated), separate funding accounts to differentiate grant funds from other funds, cancelled checks/disbursement documents for payments to vendors and/or subcontractors. 3. Internal Controls: Review of fiscal policies (transactions for receipt, approval and posting must be made by more than one employee for any one transaction).
Program Review	2-4 hours	Project Director and program staff	Interview program staff, observe groups or treatment interventions, review of case records, files, surveys or other supporting documentation for meeting grant objectives, review of challenges and successes, etc. Visit program site(s), wherever possible.
Program Data/Outcomes	60 minutes	Project Director and data staff	Review plan for project performance and outcomes; review data collection processes and/or systems.

Review:

- ✓ Communication is KEY
- ✓ Know What's in your Contract
- ✓ Reference the Grant Admin Guide
- ✓ Document, Document, Document
- ✓ Prior Approvals on Certain Expenditures
- ✓ Quarterly Invoicing on the One Drive
- ✓ Requests for Modifications
- ✓ Desk Reviews with Supporting Docs
- ✓ Site Visits | Monitorings

LET US KNOW HOW WE CAN ASSIST!