


Missouri Foundation for Health Grantee Orientation



How We Work Together

- Award Management
 - Grant Award Agreement (GAA)
 - Project Budget
 - Reporting and Learning
 - Payments
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- Additional MFH Resources
 - Communications/Messaging
 - Health Policy
 - Missouri Capture (MoCAP)



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Grant Award Agreement

GRANT AWARD AGREEMENT XX-XXXX-XXXX-XX Grant #

THIS GRANT AWARD AGREEMENT ("Agreement") is entered into between The Missouri Foundation for Health ("Foundation") and _____ ("Grantee"). Foundation and Grantee agree as follows:

1. **Grant Amount and Purpose** Foundation is funding the project as described in Attachment A ("Project") in the amount of _____ (the "Grant"). Grantee will only use the Grant for purposes of the Project. Grantee must get prior approval from Foundation to change the scope of the Project. Grant Purpose
2. **Grant Period** The grant is for a period of _____ months beginning _____ and ending _____ (the "Grant Period"). Grantee can submit a written request for approval of a no-cost extension to Foundation prior to the Grant Period end date. Grant Period

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When sharing the agreement with those involved in the project, keep in mind there may be confidential information in the budget such as salaries.

Please share this information with the individual who will be completing financial reports.

Grant Number – reference in written correspondence (letter, e-mail), have available when calling

Grant Purpose – #1 of GAA and Attachment A (proposal)

Grant Period – no expenses prior to the project start date

Use of Grant Funds

- Use of Grant Funds (#3 & Attachment B of GAA)
 - Expenses must be spent within the grant period and consistent with the approved project budget
 - Prior approval by MFH is required for changes to the approved budget

Spending should be in accordance with the approved Budget/Budget Narrative (Attachment B). The Budget is a Spend Plan.

Spending on non-budgeted items is unallowable without prior written approval. E-mail to the Strategist and Project Analyst describing the budget changes, the amount of the change and why the change is needed. E-mail correspondence provides written record for future reference. There may be some instances when a formal amendment is required.

Financial Reporting

- Reporting (#4 of GAA)
 - Financial interim reports are required
 - Financial supporting documentation must be submitted with each report for the current reporting period.

Budget Line Items	Required Documentation
Salary	Payroll register
Contracted Services/Other Comp	Paid invoice
Equipment	Paid invoice
Travel	Paid invoice (airfare and hotel)
Other Direct	Paid Invoice (items over \$250) and general ledger detail

[Link to MFH Online System](#)

All reports are submitted through the online account used to submit the application. A reminder email will be sent to primary and secondary contact 3-4 weeks prior to due date with report format and a link to the online system. You should go to the Reports tab in your online account, select and complete the report for the appropriate due date.

Financial supporting documentation must be submitted with each report. See your agreement for required documentation.

Financial Report

	Enter project dates		Enter project dates		Total Expenses	Total Actual Amount
	MM/1	MM/2	MM/1	MM/2		
Entered Revenue						
Entered Revenue	3,750		3,750		0	3,750
Total Entered Revenue	0	3,750	0	3,750	0	3,750
Expenses						
Salaries	12,230		12,230		0	24,500
Benefits & Payroll Taxes	3,200		3,200		0	6,400
Total Compensation	0	15,530	0	15,530	0	31,130
Contract/Other Comp	10,993		10,993		0	21,986
Equipment	0		0		0	0
Travel	1,170		1,170		0	2,340
Other Direct	0		0		0	0
Salaries	0	12,160	0	12,160	0	24,320
Indirect	2,334		2,334		0	4,668
Total Budget	0	30,053	0	30,053	0	60,106
Net Project Cost	0	-26,303	0	-26,303	0	-52,610

[Financial Report Variance Explanation](#)

Financial Report Variance Explanation:
Provide a brief explanation of actual expenses that vary by +/- 10% of each line item approved in the annual agreement. Add change (increase or decrease) to an approved line item (more than 10% requires prior written approval from MFH staff).

[Financial Report](#)

Project Budget Financial Report Rev ...

The financial report is already filled in with grantee's approved budget. The report spreadsheet can be found in the approved budget Word document on the last page or you can download a [report template](#) from the website.

Expenses should be recorded in the column YTD Actual Expenses. The Actual Total Expenses column will automatically calculate.

A variance explanation should be included for each line item if actual expenses vary by +/- 10%

Learning

- We take a learning approach
- Brief project update and financial report
- Some projects may have a specific evaluation and research plan
- Grantee may request meetings, calls, visits with staff to share progress/questions/troubleshoot as needed and as scheduling allows
- As our approach evolves, we may invite your organization to additional learning, training, and or collaborative opportunities

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Project status reports may be required. Grantee may be asked to participate in periodic site visits, meetings, or phone calls.

We are curious to learn what is working and isn't, how things change and evolve (and go off the expected path), but we do not have any specific reporting structures and are taking a more relationship-based, conversational approach

Project update and financial report is very brief update (up to one page) to help with tracking expenses but is not asking you to provide detailed information on outcomes, activities, etc.

Your project might have its own evaluation and research plan - depending on that, we may request check-ins/conversations to hear about what you are learning

- Evaluation reports/findings should be shared with MFH – evaluation your organization may be already planning, not required, vary based on project
- If not research-based, we may ask for any outcomes they are collecting to give us an idea on how things are going from a metrics/learning standpoint - there's no template from us
- Overall, we may ask you to share learnings with us as part of a conversation – we might reach out to connect (could hear from someone on our Learning & Research team)

Potential additional opportunities – not required but as the work unfolds, additional opportunities may arise for learning opportunities that we may invite you to in a group setting

- We may also convene people on an as needed basis to have broader conversations about systems change, capacity-building, topical discussions, bigger opportunities based on their work
- Conversation may happen at multiple levels and with groups of grantees as needed

Payments

- Payments (#4 of GAA)
 - Initial payment: Upon receipt of signed GAA but not prior to the grant start date in #2 of the GAA.
 - Remaining payments: Upon receipt of reports and supporting documentation. At least 85% of total payments must be expended.
 - Final payment: Paid on a reimbursement basis upon receipt of report and supporting documentation. The total grant amount must be expended by the end date in #2 of GAA.

Confirm if the name, title, email, and phone of the individual identified on the Application Acknowledgement form who is authorized to receive email notification when ACH disbursements are made is correct

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MFH provides payments by direct deposit (ACH) which allows for immediate availability of funds, enhanced security, and convenience. If not already enrolled in ACH, request the form from the project analyst

Payments are scheduled based on expected spending outlined in the proposal narrative and timeline.

Initial payment – upon receipt of the signed agreement but not prior to the grant start date in #2 of the GAA

Remaining payments– upon receipt and approval of interim reports and supporting documentation. Expenditures of at least 85% of total disbursements. If the expense threshold is not met, you should still submit a report.

Final payment – withhold of total grant ***(To receive final payment, the total grant amount must be expended by the end date in #2 of GAA)***

Amendments

- Grant Award Agreement Amendments
 - Changes to grant activities (Attachment A of GAA)
 - Budget reallocation (Attachment B of GAA)
 - Grant extension (#2 of GAA)

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Occasionally, grantees experience challenges implementing project, spending budget ...

There are times when changes need to be made to the grant activities which may need a formal amendment. This does not refer to changes to the purpose of the project.

Budget reallocations happen and there are times when they can be approved by email. Some may warrant a formal amendment.

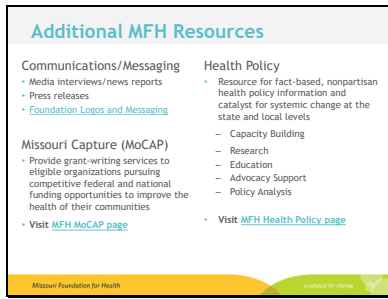
No-cost project extension: allows for additional time to complete project objectives. Extensions are determined based on the circumstances of the project. Requesting a project extension to expend remaining funds is typically not allowed.

Contact MFH staff to discuss changes.

Please notify the assigned Strategist and Project Analyst of any changes to project contact information or changes within the organization.

If questions are financial/budget related (disbursements, budget reallocation, change in line item, extension, etc.) contact the project analyst

You may hear from different departments at MFH so if you're not sure who to reach out to contact the strategist who sent you the email award notification.



Health Policy:

Resources on website – legislative updates, fact sheets, white papers, and policy advocacy trainings for nonprofits – many virtual

Missouri Capture (MoCAP):

Offers consulting services and technical assistance at no cost to the organization, including

If open opportunity has been identified: (requests must be submitted 5-8 weeks prior to due date)

- New customer: Complete Potential customer worksheet - link on MoCAP page of website
- Previous customer: Email MoCAP with information on opportunity (name and link) and proposed project, preferred consultant – concept paper

Communications:

- Feel free to send us links to articles/news reports, let us know about interviews
- Can connect you with our Communications team for things like reviewing press releases
- Find [logos and messaging language](#) on our website