

**Health Center Planning Grants (HCPG) Mid-Year Progress Report Training
(Grantee Session)**

**Moderator: Desha Anderson
March 8, 2012
1:30 pm ET**

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode. To ask a question during the question and answer session, please press star 1 on your touchtone phone.

Today's conference is being recorded. If you have any objections you may disconnect at this time. I would now like to turn the meeting over to Desha Anderson. You may begin.

Desha Anderson: Thank you, Julie. Good afternoon and welcome to the Planning Grant Mid Year Project Report Training Session for Grantees. Before we get started with the training today I would like to give a few instructions regarding the phone and Adobe Connect.

Regarding the phones, all of the phone lines are currently muted, however, we will take questions after the presentation and the operator will provide instructions at that time as to how you can ask questions.

For those who have joined us online via Adobe Connect, please note the following. In the middle of your screen, you should see the title slot of the presentation and if you would like to make the presentation window larger the full screen button and the size of the screen will change.

To exit the full screen view, you can click the same button and everything should return to normal. Also right under the presentation is the captioning pod and if you need to refer to that during the presentation, please do so.

On the left side of the screen, you will see two pods. The one at the top is the note pod. This pod contains the following information. There's a link to the planning grants technical assistance Web page and there's also instructions on how to participate in the question and answer session that will take place at the end of the call.

The pod that's right below it is the chat pod. As noted, there will be an opportunity for questions after the presentation. To ask a question via Adobe, we ask that you use this chat box to submit your question at any time during the presentation; so that if we don't get a chance to answer it during the session we will be able to record it and provide an answer to you after the session has ended via FAQ document that will be posted on the technical assistance page.

So this is the end of the instructions and we will now turn the meeting over to Jim Macrae, Associate Administrator of the Bureau of Primary Health Care.

Jim Macrae: Thank you. Good afternoon and good morning to those out on the west coast. Thank you so much for joining us today on our call looking at health

center planning grants. My name is Jim Macrae as Desha said and I'm very pleased to have you all join us today.

We really do see the investments in planning grants as a strategic investment increasing the capacity across the country to provide preventive and primary care services to medically underserved populations.

And we were very pleased to be able to have the opportunity to award as many planning grants as we did last year and you all should really feel proud of that accomplishment of receiving that planning grant funding because we had a number of organizations that were interested in applying and you were a select group that was picked to actually receive this award.

In addition though - it's not just enough to get an award and we know you know that and we know that. We really do want to work with you to work to see if we can develop the expertise and capacity to become a full-blown health center.

And so one of the things that we're going to ask you to talk about - and we're going to go through it in the slides today and Avni will take the lead in doing that - is really to hear your progress and some of your challenges that you've experienced as you've taken on this award and are taking on really the responsibility to develop a primary care system in your community.

It is critically important for us to hear your successes as well as some of the challenges that you're experiencing. And don't feel bad if you have challenges. It is not easy to become a health center.

As you all know, there are a lot of requirements that are involved. There are a lot of expectations and it does take time to be able to develop that expertise and experience to become really a full blown full fledged health center.

So when you give us your report we ask that you highlight those most important elements that you feel really have helped your whole planning effort along but then again also share with us some of the challenges that you've experienced because that's important for us to hear.

In addition it's important because it helps us to identify any kind of additional technical assistance or training that we can provide in terms of support to you as well as support to any new access point applicants that we may have in the future. We really do see this as a critical partnership in terms of our work together.

One of the other questions I'm sure you all will ask so I'll try to answer it so Avni won't have to is what is the future in terms of funding. You may have seen in the President's 2013 budget, there were resources available to support applications for new access points.

In the President's budget. It includes funding to support at least 25 health center new access points. And so at this point, based on the President's budget, we do plan to hold a competition in 2013 which given your current work as a health center planning grant you all should be well positioned to be able to apply potentially for that resource when that guidance comes out.

That guidance won't come out for a while because we still have the whole process to go through which respect to the 2013 budget. The President

proposes then Congress enacts and then ultimately it's signed but it does give you some indication that there will be some aspect of new access point planning our grants in the future.

In addition, there is always the opportunity as you make progress and feel like you've either reached or have met all of the requirements to come in and to apply as a FQHC Look-Alike program, that is an opportunity that is available to organizations at any point in time when they feel like they have fully met all of the expectations and requirements to be a health center.

We don't anticipate many of you being able to do that right now but we do hope that many of you explore that as an opportunity after you've completed your planning grant work.

And for many health centers it's a great first step to take after a planning grant to actually become a Look-Alike because you actually get additional support in terms of helping understand fully all the requirements.

And to be honest, there is often a lot of back and forth in terms of really making sure that you understand and can meet those requirements. And it has been a very important spring board for many health centers to then successfully apply to become an actually federally funded health center.

So that's something down the road but I figured many of you might ask that question so I just wanted to put it there that there will be opportunities we anticipate in 2013 for applications. There will always be opportunities through the Look-Alike program to be able to apply.

But most importantly and for today's conversation and call I really want to focus on hearing from you - well, first, sharing with you what our expectations in terms of reporting but most importantly for you all to be able to tell us your story about what's going on in your community and your developmental efforts.

So thank you again for being part of today's call. We really appreciate all the time and attention that you've already put into these grants and I'll turn it over to Avni at this point to walk you through all the specifics. So thanks everybody.

(Avni): Thanks, Jim and welcome everyone. We really appreciate the opportunity to connect with you on this important work that you all are doing.

The purpose of today's training is to provide you with guidance on the semi-annual reporting requirements as well as to provide technical assistance on the process for uploading these semi-annual reports into the electronic handbooks known as EHB.

Our session today is broken into three sections. First I will review the reporting requirements and walk through the semi-annual report template. Second Jillian Gregory will provide a live demonstration of the EHBs. She will review steps that are needed for all grantees to be able to navigate into EHB, to view the submission and to then complete the entire process.

The steps that she will be demonstrating are available in your slide presentation which is on our Web site as well for those of you who are not on Adobe Connect.

And so you will be able to follow along through the slide presentation and make notes of anything you noticed during the demo that would assist you in the technical assistance portion of the training.

And lastly we will open up the phone line as well as take questions through Adobe Connect and as was already mentioned by Desha, we will be developing a list of frequently asked questions and posting them on our Web site which will be made available to you at the end of today's presentation and we will continue to update that FAQ list as additional questions come in.

So you might want to save that link and be able to visit it frequently as you go through this process.

Next slide please. Thanks. As you all know in fiscal year 2011 HRSA funded health center planning grants to expand the current safety net on a national basis by targeting, planning and developmental efforts in areas not currently served by a funded health center or those areas where there remains unmet need.

The funding grants were a competitive opportunity for non-profit entities seeking assistance to plan for the development of a comprehensive primary health care center.

All health center planning grant recipients are required to submit a semi-annual progress report as explained in the notice of award. The reporting requirements are as follows.

First, all reports must be submitted in EHB on or before midnight of April 1st. Please note that emailed or faxed reports will not be accepted. Second,

grantees are strongly encouraged to use a template that has been provided via EHB. This reporting template is based off of the work plan structure from the application you submitted and includes probing questions directly taken from the funding opportunity announcement.

Said differently, this templates helps you to understand what HRSA is looking for in your report and hopefully it will be a tool for you in assessing the depth and breadth required for each section of the report.

And lastly the reporting requirements are such that each grantee is required to document the progress to date relative to your approved work plan in terms of goals, objectives, key action steps and expected outcomes.

And I emphasize the word 'approved' because there were some grantees that had the requirement of submitting a revised work plan. And so we are discussing the progress that's been taken to date relative to the revised work plan.

We're now going to shift gears and I'm going to let my colleagues here handle the technology. We're going to switch out of the PowerPoint and I'm going to actually walk through what the reporting template looks like and provide suggestions on how you may use it to complete this reporting requirement.

As Desha had mentioned, for those of you who are using Adobe Connect please refer to the full screen option so that you were able to enlarge the image if it's difficult to read.

This template has been provided for all grantees in EHB through this submission and you'll see a demonstration in the next section of how to access this.

At the top of this report template is the opportunity for grantees to enter their organization name and grant number through a header format that will then translate to the remainder of the document.

As I had mentioned, the template here is built off of the application that you all submitted through the EHB and so the gray section, the section headers and goals are taken verbatim from your work plan submission.

What's specific in this reporting requirement is that the blue section highlights the probing questions and they're divided into three categories. On the far left you'll see that there is the key action steps column. What we're looking for is your report out at mid-year against what you had proposed to be your actions to achieve your goals and objectives.

As Jim mentioned, we understand that this is very challenging work and that different organizations have different capacity to begin with. And so we're not necessarily looking for an arbitrary halfway there-type report but we are looking for your reflection and your analysis on the actions that have been taken thus far to help you achieve the goals you set out to do so in your application.

The second column over is expected outcomes. Again, this is taken from the template that you responded to in the application. This is the section that Jim mentioned regarding discussing the outcomes that have been achieved thus far.

And then the last column may be where you spend the most time writing in your report and that is to document what's working for you, what are your successes, tell us the story of what's working as well as recognizing what may be holding back some progress.

And then the second question that's built it is to help us understand what technical assistance resources you've used to date as well as any areas where there may be additional technical assistance needed.

Now this report template is a few pages long. It follows the exact same structure breaking each of the five required sections of your work plan into key action steps, expected outcomes and comments. The probing questions in the key action step section vary by the section header.

So for example, your actions taken to date on your needs assessment, the questions that we're looking for you to answer do vary from the steps that you have taken towards pursuing some sort of governing structure.

However, the expected outcomes and comments section, the probing questions that we ask of you are exactly the same. So hopefully that will help you organize your reports and your reflection on how things are going to date as well as identifying the needs for support to assist you in achieving your final goals by the time that you get to the end of the project period.

So what you'll see on the screen is once we go down and pass the blue probing question section is the yellow area and this is where it's open to grantees to use free text to respond to the questions above.

We're not being too prescriptive on how you write your progress report and how much you submit. What we're really looking for is a clear understanding of where you are and what you're doing to get to the remainder of those action steps in your work plan to achieve the goals in that framework of what's working well and what is not, what are the lessons learned in terms of areas where things are not progressing as originally anticipated.

This is also an opportunity to propose to your project officer any suggested changes in strategy and there will be opportunity for dialogue with your project officer upon the end of this submission to really reflect and strategize on the next steps moving forward.

You are not required to keep your text in yellow highlight. That is just really there as a tool for you to know where is the section for you to respond so that you can organize each section your mid-year report.

And so I'm going to now move away from the reporting template. We'll take questions at the end, so now I will turn it over to my colleague Jillian Gregory who is going to do a demonstration of how you're going to use EHB to access this template and then complete your report.

Jillian Gregory: Okay. Thank you, Avni and hello everyone. I will be doing a walk-through of the electronic handbooks. The first page that you will see here on the screen is the EHB log-in page.

It's very important that everyone who needs to view or work on this progress report register in the electronic handbook. If you've not already done so you can follow the instructions for registration that are listed on the login page.

Another point that I want to point out is at the top of the page there is a link to a knowledge base that has frequently asked questions to help you through the registration process.

Once you've registered in the EHB you'll login with your username and password which will open the electronic handbook homepage. The semi-annual progress report is a submission under the grant portfolio.

You would click on the view portfolio link on the left side menu. And here you will see the planning grant. Click on open grant handbook link and this will provide you access to grant related information depending on your role.

The project director for the grant will have the ability to manage the privileges for anyone else at the organization that needs to work on the semi-annual progress report.

The progress report is located in the submission section. You can click the monitor schedules link to see a list of all upcoming submissions. Here we see the semi-annual progress report. It's an "other submission." Click on that link. The submissions list page will display the semi-annual progress report. It will show that the deadline for this submission is on April 1st. That's in 24 days.

We have three options down here. We have the ability to start submission. Once you start this submission this link will change to edit submission when you come back to work on it.

The view guidance link will open a page that will provide access to the instruction documents for submitting this semi-annual progress report

including the grantee instructions for developing the planning grant semi-annual report and instructions for using the EHB's to submit this information.

There is also an option to request an extension but we do want to point out that extension requests should be used sparingly only if you absolutely cannot submit it by the April 1st deadline.

So to get into the report you'll click the start submission link and basic information will appear at the top of the page. You'll have the access to the guidance documents, which for this particular report include the grantee instructions for developing planning grant semi-annual progress report and the planning grant submission instruction. You can view these instruction documents by clicking on the view link. Sorry about that. There you go. Sorry about that.

The next section in this semi-annual progress report is the template. So as (Avni) mentioned it's highly encouraged that you use this template for submitting the progress report.

You will click on the download link and then save the file to your computer or to a shared network drive where you will complete the file offline and then upload it as an attachment into the EHBs.

So here is the same form that (Avni) went over. The fields that you should complete are highlighted in yellow. You'll complete the form and save it to your computer. And once it's completed you will upload it as an attached document.

So click the “Attach” button. You'll browse to locate the file on your computer. You can enter a brief description here. This may be the name of your organization and then click the “Attach Document” button.

Once the document appears listed on the bottom of the page you will click “Finished attaching.” And now as you scroll down you'll see that the document is attached here.

Once you've completed the report attachment and uploaded it into the EHBs, you have two options. In the bottom right hand corner there's a choose action drop down menu where you can either choose to submit to HRSA or save and continue.

If you know that you might need to make some changes to the report attachment you can choose the save and continue option which will keep the report in your pending other submissions list until you submit it to HRSA. Again, the deadline is April 1st and it should be submitted by then.

You can come back into the report at any time up until it's submitted and make changes. You can delete the file and upload a new file if you made changes to the progress report.

But once you've completed all of the information in the attachment and you're ready to submit to HRSA you'll choose the “Submit to HRSA” option in the choose action dropdown menu and click “Go.” You will have a confirmation page that will give you one opportunity to review your attached document before you submit it to HRSA.

If you realize that there are changes that need to be made you can click cancel and it will take you back to the previous page. If you are ready to submit click "Submit to HRSA." And you will receive a confirmation message at the top of the page that the submission has been successfully submitted to HRSA.

Now one thing I want to point out is that once the semi-annual progress report is submitted successfully, it will no longer show up in the list of pending submissions. That does not mean that it's deleted from the EHBs or that you can't get back to it.

So to get back to a submitted report you can go to the other submissions link, choose the search option and change the schedule status to all and then click search. This will show all of the reports or submissions that have been submitted for this grant.

So here we see the semi-annual progress report. Any other submitted reports would appear listed here. For those of you who had to submit a revised work plan, that work plan would also be listed here. So if you need to refer to that revised work plan you would do so by searching for submitted other submissions.

The next thing I want to show you is how you can access the original applications in the EHBs. Unfortunately at this time the original application is not tied to the specific grant information.

So we'll go back, we'll click on the home link where you'll have a view applications link. If you were one of the people who originally worked on the

application, the application will appear listed here and you can open it and view the work plan from within the program specific information section.

So I believe that was all I had to go over with you all today. I'll turn it back over to (Avni).

(Avni): Thank you, Jillian. We're going to transfer back to the PowerPoint presentation slide 12. And as I mentioned earlier those slides that we're skipping over were the steps that were just discussed by Jillian in the demonstration.

All grantees will have access to resources for support with for support with this reporting requirement as well as ongoing assistance with the activities in your approved work plan.

First your project officer will be available to you during this period of time when you're working on your report as well as after you've submitted it to assist with program-related questions.

Second for EHB or systems-related issues, please reach out to our experts at the BPHC Help line. They're available by phone and email and they provide one on one support to resolve technical issues such as accessing EHB and each of the steps we reviewed today from navigating to the report to completing the report, submitting the report and viewing the approved application.

And lastly, on this slide we've included the link to the login page to EHB, which is where Jillian started her demonstration. This concludes the second

portion of our training. We will next transition to the question and answer portion of this technical assistance call.

Operator, if you could please begin to queue the line for questions. Once we've concluded with questions from the phone, I will then take questions from the Adobe chat box.

Please note that if you have questions that you were unable to respond to in the time that we have today that we will be posting them on our TA Website which is listed here on this slide.

Additionally you're able to contact me with follow-up questions at the email address provided on this slide the BPHCPlanGrantReports@hrsa.gov. Please note that some of you may have received an announcement about today's training with a different email address. And it is preferred to use BPHCPlanGrantReports@hrsa.gov. It is the best mechanism by which we can respond quickly as well as aggregate the questions to keep our FAQ document up to date.

Coordinator: Thank you. At this time if you would like to ask a question, please press star 1, unmute your line and record your name. To withdraw your question, press star 2. Again, if you would like to ask a question please press star 1 and record your name.

Your first question comes from (Natasha James Walden). Your line is open. (Natasha James Walden), please check your mute button, your line is open. Go ahead. You are from the Jewish Renaissance Foundation, your line is open. We'll go to the next line. (Rebecca Bernard), your line is open.

(Rebecca Bernard): Yes, I wanted to know if we wanted to attach any new files like the results of our community needs assessment, is that possible to do and are there any file size limitations for any attachments and is there any file size limitation for the actual report.

Jillian Gregory: I will defer part of that answer to Avni. As far as the EHBs goes it will allow multiple attachments in addition to the template. As far as the file size, 10 megabytes is the maximum file size that the EHBs allow.

(Rebecca Bernard): Thank you.

(Avni): This is Avni. On the programmatic side, yes. The answer is yes. Please attach the completed needs assessment results, any deliverables that you have to date to accompany your semi-annual report. That's very much appreciated.

(Rebecca Bernard): And then my other comment is I went online as you were doing the instruction and see that everything is up and available so we can move forward on this and submit these reports whenever we have them complete or is it preferable to wait towards the end of the month?

(Avni): Great question. We suggest that you submit your report using the instructions that were just reviewed as soon as your report is complete. This allows for time during the reporting period which is before midnight of April 1st for your project officer and for you to engage in any dialogue if you have questions or looking for guidance on any particular section of the report.

So earlier is better whenever that's feasible but we do understand that the window of time for this reporting requirement is a little tight so please don't

feel the need to have to rush at the expense of providing a report that is most reflective of the work you've done.

(Rebecca Bernard): So, I'm sorry. You just made me think of another when you said we can work with our program officer. So we shouldn't submit this report and then work with the program officer. We can just work offline with the program officer on this document and then once we're all on the same page submit it?

(Avni): Yes, that's correct. There are two options. The system does allow for once you've submitted for your project officer to open the submission attachment and discuss and if there are any questions or additional changes needed they can send it back to you through a mechanism in EHB called "request change."

However, you are able to work offline with your project officer in pursuit of technical assistance and programmatic guidance on the content to be reported in the semi-annual report itself.

And your project officer will discuss with you the best mechanism depending on what time period we're at. If it's close to now versus if you're getting close to that deadline of 4/1 they'll probably encourage you to submit into EHB in time for that deadline and then do any follow-up engagement afterwards.

(Rebecca Bernard): And I'm realizing I have another. I hope I'm not hogging this but I'm not seeing - but maybe it's here and I'm just not seeing it - a financial accounting report. This looks like it's just a narrative semi-annual progress report form. Is that correct?

(Avni): That is correct. The semi-annual reporting requirement is a programmatic reporting requirement as discussed on your notice of award. At the end of

your project period will be the time when the grants management specialist will be engaging with you on the financial statement to date of the utilization of the federal fund.

(Rebecca Bernard): Thank you.

Coordinator: Next question comes from (Bev Harbin). Your line is open.

(Bev Harbin): Hi, good morning from Honolulu. I have two questions. We have a very large substantial community event that's centered around this planning grant. We have been asked by one of our television stations to record the whole thing to be able to put it on public T.V. Could we put the link to this activity in the report?

(Avni): Yes, absolutely.

(Bev Harbin): Okay. Very good. My next question is of course because I'm all about what's my next step, Avni, you first opened you said it looks like there will be some NAP funding in 2013. Do you have any idea which quarter?

(Avni): Well, I'm unable to speak for Jim but I can say that our fiscal year - and there was a question posted so I'm going to answer two questions in one. By 2013 we mean the federal fiscal year of 2013 which begins on October 1st of 2012 and goes until the end of September of 2013.

Now depending on the congressional appropriation timeline for the fiscal year 2013 budget, that timeline would dictate when an announcement could be made for New Access Point funding.

(Bev Harbin): May I assume that what you're talking about right now will be for new start ups and not to continue to implement existing community health centers.

(Avni): As is written in the President's proposed fiscal year 2013 budget, the language is such that there would be potential for additional funds specifically for new access points.

Now again as Jim mentioned, what is proposed by the President versus what is passed by Congress may vary so we will provide updates as we near those timelines.

(Bev Harbin): Okay. Thank you.

(Avni): Thanks.

Coordinator: Again, if you would like to ask a question please press star 1 and record your name. The next question comes from Diane Demperial.

Diane Demperial: Hi. I have two questions also. One is about the new access point. If we have submitted an application for an FQHC Look-Alike and it's in process when the request for proposal comes up for the new access point, would there be any problems with having both applications being submitted simultaneously?

(Avni): No, there is not a conflict in pursuing Look-Alike status and also applying for a NAP (new access point).

Diane Demperial: So if we - I understand that it could take up to six months so if we have the Look-Alike application submitted but hadn't gotten a response and the NAP

application came out we could still apply and be competitive in that new access point?

(Avni): That's correct. Our new access point awards are based on the guidance that's in the funding opportunity announcement and so the assessment through the objective review committee of the NAP application is scored against the criteria in the funding opportunity announcement. It is separate from Look-Alike application status or somewhere in between.

Diane Demperial: Okay, so there's this completely independent process?

(Avni): That's correct.

Diane Demperial: And the most recent thing that we had heard was that if more money was available they were likely - I guess they being you - HRSA was likely to go back to the applications that were submitted in the most recent cycle and fund from that pile. Is that no longer the case?

(Avni): Well, that school of thought is speculated for this fiscal year 2012 which Jim mentioned. The funding opportunity announcement for new access points that would be issued after your project periods end would be for fiscal year 2013 so it would be separate from any discussion of fiscal year 2012 budget.

Diane Demperial: And one last question. April 1st is actually a Sunday. If we are going to have trouble getting it in by then by then but could probably get it in April 2nd, would we still need to apply for an extension?

(Avni): My understanding on the program side is yes. Jillian, do you have any insight on the technical side?

Jillian Gregory: I believe so, yes.

Diane Demperial: If we have it in by April 2nd we would still need to request an extension?

Jillian Gregory: Yes.

Diane Demperial: Okay. Thank you.

Coordinator: There are no other questions at this time.

(Avni): Thank you, Operator. I'm going to transition now to the Q and A session that's in our chat on the Adobe Connect. We received a question from Sandra. Does the username and password expire every 90 days?

Jillian Gregory: Yes, every 90 days the password expires. The username does not expire. If you try and login after the password has expired, you'll be prompted to create a new password.

(Avni): And the next question from the chat box is "what is the core grant number?"
The all planning grants that have been awarded have a code at the beginning of their grant number which is P (like Peter) 04. And that entire number, the P04 plus your specific organization's grant number is available on the top left side of your notice of award.

You can also see that notice of award in your grant folder when you log into EHB using the instructions that have been provided. You have electronic access to that information as well.

Great. The next question is “if we have realized that at this point in time we may need to revise our overall work plan, what is the process for doing so? Should we mention that in the mid-year progress report?”

I would say that you should but that this is a separate process. Your grant was funded based on the approved work plan submitted with your application and so if there are significant changes to what was proposed, that is a separate conversation that you need to have with your project officer and potentially your grant management specialist if there is a change in the budget over 25%.

That is not to say that you shouldn't mention these things in your progress report. You need to continue to report where you're at with what you propose as well as potentially discussing strategy for a shift in the method by which you are moving forward.

These are general parameters, please contact your project officer for the specifics for your work plan. In general, if you're changing the mechanism by which you are pursuing your goal, meaning that some of your action steps are changing, that would not require a revised work plan. However, if you are changing much of the actual outcomes of the work, that would require a revised work plan.

The next question, “will the key action steps and expected outcomes already be filled out or will we need to write them in from our original work plan?”

Sadly, they will not be included automatically in the document that you have is a blank template and so you are able to copy and paste from your original

application or your approved if you had a revised work plan submitted, the key action steps and expected outcomes.

However, we wanted to leave the flexibility for you all in case the key action steps that were in your original work plan or approved work plan were for a 12-month period and you want to report out on the key action steps at this point in time that have been taken as well as your plan for how you're going to achieve the remainder of those action steps in the time left in your project period.

“How do I update the work plan to show revised dates?”

We do not have a column in the template that's been provided for the proposed dates, however, that was a section, a column in your original work plan. You are able to modify the template that's been provided and add a column for your date. If you do want to make some shifts to those so that your project officer is best able to support your work through technical assistance and other resources.

The next question “is the time frame of the reporting period September 1, 2011 through February, 2012.” Yes, the reporting period does start on September 1, 2011.

We do understand that some of you received your notice of awards a little bit into the month of September, however, your funding is for the period from September 1, 2011 through the end of August of this year 2012.

At mid-year, you know, we don't have a set parameter that you must report up to March but potentially if you're able to report progress until mid-March

or end of March, which is ideal. However, it is not a fast and firm expectation. February would be reasonable for that specific question that was proposed.

“Can you repeat the triggers for the need for a revised work plan?”

Sure and these are general parameters. Please know that it is advisable for each grantee to work directly with his or her project officer to flush out if a revised work plan will be needed or a revised budget.

Both situations are really based on any significant variation from what the bureau approved as the project for this funding opportunity announcement. There is a requirement that all the work plans that were approved for the funding announcement were approved as submitted in this competitive funding opportunity announcement.

And so if there is a dramatic shift in focus so far as that it varies from what was originally proposed and would look very different to an objective reviewer now than had they seen it when it was submitted, that does warrant the conversation with your project officer around a revised work plan or budget.

“How detailed are we required to be when describing community partnerships? Are we required to submit a complete listing of our partners or just a description of who they are?”

I would say that the answer varies depending on if you are a grantee that had a service overlap condition or special term placed on your award. Those were placed in specific cases where the data analysis that was done to identify the

unmet need in a community identified potential service area overlap because there are other critical access hospitals, rural health clinics, Look-Alikes or federally funded health centers in the same service area but not yet meeting all of the unmet need.

So in those cases, I would strongly encourage a description not only of who the partners are but what activities you have taken during this planning opportunity to strengthen and foster those relationships to best meet the unmet need in that area.

If you did not have a standard condition or a general term on your notice of award, it is appropriate to describe the level of engagement. Again, I refer you to the probing questions that will give you the guidance on how much information we're looking for and there is an opportunity to engage with your project officer during the development as well as after this submission.

The next question is “do we have a standard or required format for the community needs assessment.” The answer is no, we do not. I encourage an organization to work with their project officers as well as the Primary Care Associations which are our cooperative agreement partners at the state and local level that provides support to all 330 funded organizations including planning grants.

They provide technical assistance and training and have a lot of resources on needs assessments, sample letters of support or MOUs, things that you guys might be working on. There's no need to reinvent the wheel, so please reach out to those partners.

And if you're unaware of how to do so please contact your project officer and they'll be happy to connect you with those resources that exist. There are also additional technical assistance supports that your project officer can refer you to such as the Look-Alike Web site and other tools and frameworks that are available to those organizations seeking federal funding or Look-Alike status.

That's kind of a good roadmap of how far you could go with your planning efforts. It doesn't necessarily mean that the readiness level is there at this point but if you're looking for templates, it is advisable to seek those that health centers would use to best guide your planning.

The next question is "so for a revised work plan, can we just put the revised work plan in the document we are submitting for the progress plan." The answer to that is no.

A revised work plan goes through a different mechanism in EHB because it does require a different level of approval and would require a notice of award to be issued for that work plan once it is approved.

So I don't want to get into too much detail on that process. It does differ from your semi-annual reporting progress report process and so please refer to the resources listed on slide 12 for information on how to submit a revised work plan.

"Do all funds need to be expended by August 31st, 2012?" That is the end of the project period. At this time, that is really the target that we ask you to aim for. If there is potential for any changes to that, that will be shared at a later date but at this point in time I do not have any information other than

to tell you that your notice of award is for the one year, 12-month project period and that is the time during which all of your activities should be occurring and all of your funds associated with them spent down.

At this time I'm going to transition to the operator and see if there are any additional questions on the phone.

Coordinator: There is a question. (Bev Harbin), your line is open.

(Bev Harbin): Hi, good afternoon again. Actually I have a couple of questions. The - our legal documents and corporations papers and by-laws and the application for the 501 C3 have been completed and will be approved by the new board this month. Do you want us to attach that or just give you an overview?

(Avni): It would be fine to give an overview at this point in time of your status. Again, the probing questions in the template do ask you to give us a status update on where you are and identify if there are any road blocks.

So this is a chance to tell your success story of what you did to get to that point in case there's any lessons that we can learn on our end to share with other grantees that may not be as far along in that goal.

(Bev Harbin): And the follow up to that, would you like us to give you like an overview of the composition of the board and how it fits into what the community looks like?

(Avni): Yes, that would be wonderful. The section in your template on the reporting template on the governing does ask those type of question what are your planning efforts thus far in terms of identifying what a representative board

would look like and what efforts have you taken to seek out potential board members. So that would be the section in which to report that success.

(Bev Harbin): Okay. And then my last question is on the MUA. It's not that we ran into any difficulties. It's the person at the department of health didn't feel - she wasn't quite able to get all the information she needed to get but we're working with her and we know the time line and data that we are uncovering and receiving from hospitals and physicians and from other state departments is helping her put the MUA together. So can we just say that it's explained about this work in progress but we have been assured it would be done.

(Avni): Yes, that's correct. At this point in time knowing that you're at the semi-annual mark of your project period and that it's not a fair assumption to say that you're six months and therefore halfway through each of the activities you've pursued.

We do understand that in your planning efforts there is an appropriate amount of time needed for some of that steeper climb at the front end of your planning activities.

And so this is an opportunity to report your progress and your outcome may be that you're not entirely at your end goal just yet but that you do anticipate no need to change your course of action because you anticipate that that outcome will be achieved by the end of your report.

(Bev Harbin): Okay. So we don't need to have it documented by DOH that, you know, what I said is right?

(Avni): Documentation is always good practice for your potential as a future health center but it is not required for a semi-annual report.

(Bev Harbin): Okay. So it would be good then to get a letter from DOH laying out exactly what I just said.

(Avni): If it's possible in time for the report, sure.

(Bev Harbin): Okay. Cool. Thank you.

Coordinator: There are no other questions from the phone at this time.

(Avni): All right. I'm taking a question now from the chat box. "We spent some of the approved conference funding on the CHI which is scheduled for September 2012. Can we prepay the registration and airfare before 831 but the conference isn't until later in September?" The answer is yes.

The next question is "if the project needs to go beyond August 31 due to circumstances beyond the control of the grantee, would there be a possibility of an extension and if so for how long?"

At this time I don't have any information on what that would look like and so we'll keep you abreast as information becomes available at the potential for a no cost extension but at this time I do not have any information that that may be allowed.

Please use the opportunity in the semi-annual report to discuss what's happening outside of your control so that we can best support your activities and your success.

Seeing no additional questions, again, please feel free to reach out at BPHCPlanGrantReports@hrsa.gov if you have additional - I'm going to cut myself off. I have one more question. "Can we apply for Ryan White part C capacity development program?"

Each funding opportunity that's announced through HRSA includes specific eligibility criteria. Having a health center planning grant with us would not preclude or exclude your ability if their funding criteria match what you are able to document is your status.

So if you need 501C3 and you're not yet there, that would eliminate your opportunity to apply but if there are no eligibility criteria that conflict with where you stand there is no issue with you applying for additional funding.

Coordinator: Another question from the phone, ma'am. (Rebecca Bernard), your line is open.

(Rebecca Bernard): Thank you. I actually just submitted online because I thought I wasn't able to get through. Two questions. Where do we get a transcript of today's call?

(Avni): Yes, the Web site that's on slide 13 which is the HRSA Web site and it directs you to our technical assistance page has today's slides and we'll have an audio transcript and an audio recording of today's session. It may take about a week for us to be able to put those resources up on our Web site.

(Rebecca Bernard): Okay. And you had mentioned through the program officer we can access resources at our state level. I thought you said a PCA organization for MOU

samples and letters of support and that kind of thing. What was the state resource?

(Avni): Yes, they're called Primary Care Association known as PCAs and they're funded through our national cooperative agreements. You're able to get a list of all the PCAs that are funded through our general Web site <http://bphc.hrsa.gov>. That's <http://bphc.hrsa.gov>. There's a link for technical assistance and under that link you'll find a link to the Primary Care Associations.

(Rebecca Bernard): Okay. Thank you.

(Avni): Thanks. The next question is "is submission of the semi-annual progress report limited to authorized officials?" Jillian, can I ask you to answer that?

Jillian Gregory: Sure. In the EHBs all of the post award submissions can be submitted by the project director or anyone that the project director gives privileges to submit other submissions.

So it does not have to be authorized official as far as the EHBs functionality goes but if your organization requires such reports to be submitted by an authorized official then it should be that person submitting the report in the EHBs.

(Avni): Any individual access and privilege and roles in EHB questions should be directed to the BPHC helpline and the information is on slide 12 on how to reach them by email or phone.

I did want to just also provide a resource to the previous question around the Ryan White part C capacity building. Each of the funding opportunity announcements does have a point of contact listed in there.

So when in doubt please reach out to those resources that are listed in any applicable funding opportunity announcement to pose a specific question about your eligibility.

Thank you for your participation in today's training session. We also welcome any feedback that you may have about the Webinar and ask for you to enter your comments in the box that's in the middle of your screen.

Coordinator: Thank you for participating in today's conference. You may disconnect at this time. Speaker's standby.

END