



## INTEGRATION INITIATIVE ANNUAL GRANT REPORT: Implementation Grants General Instructions

- Following are MeHAF's reporting requirements for the Integration Initiative grants:

2 narrative reports (6 months and 12 months) accompanied by 2 financial reports (6 months and 12 months) each year.
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- Interim narrative and financial reports cover the first six months of the funding year and are due six weeks after the end of this period, or August 14, 2009.
  - **Final narrative and financial reports cover the funding year as a whole and are due six weeks after the end of this period, or February 12, 2010.**
  - Narrative and financial reports shall be completed in compliance with the Foundation's instructions on forms created by the Foundation. These are available on the MeHAF website at [www.mehaf.org](http://www.mehaf.org).
  - Grantee shall retain electronic and/or paper copies of all reports in its files for a period of not less than four (4) years after expiration of the Period.
  - Future funding from the Foundation is conditional upon the receipt of timely and acceptable interim and final narrative and financial reports.
  - Evaluation-related, required reports (Client Data Elements and clinical outcome data) are due separately and are submitted directly to John Snow, Inc.
- Reports will be submitted online. For questions or assistance in submitting reports, contact Cathy Luce, Grants Manager, at 620-8266, ext. 104 or [cluce@mehaf.org](mailto:cluce@mehaf.org).
  - Direct programmatic questions to: Barbara Leonard, Vice President for Programs, [bleonard@mehaf.org](mailto:bleonard@mehaf.org) or 620-8266, ext. 102 for Round 1 (2007 grantees) and to Becky Hayes Boober, Program Officer, [bhboober@mehaf.org](mailto:bhboober@mehaf.org) or 620-8266, ext. 114 for Round 2 (2008) and Round 3 (2009) grantees.

### Integration Initiative Implementation Grant Narrative Report Form

Please address each question in the appropriate area of the table below and in the attachments. Your report should cover six months of activities if an interim report or **twelve months if a final (end of year) report.**

Organization Name:			
Project Number:			
Project Title:			
Total Grant:	\$	Current Year Grant:	\$
Project Director:			
Phone:			
Fax:			
E-Mail:			
Reporting Period:			
<p>1. <u>Briefly</u> update us about your organization and relevant environmental or contextual factors. Please note any significant changes or challenges that have occurred during the current reporting period, such as changes in project staffing. If none, state “none.” (Maximum: 250 words)</p>			
<p>2. Update the work plan template that is attached to this reporting form. Report on activities completed during this reporting period. <u>Briefly</u> describe in the space below any significant changes in approach from your original proposal. If none, state “none.” (Maximum 250 words.)</p>			
<p>3. In a brief narrative, summarize your overall progress in completing your planned activities during the reporting period. Include a discussion of accomplishments, key collaborators, obstacles you encountered and resolved, and challenges that may not yet be resolved. (Maximum: 500 words)</p>			
<p>4. <b>For Planning Grantees Only:</b> Provide an update on your project’s evaluation activities and attach reports or summaries, if available. (Maximum 500 words, not including attachments)</p>			
<p>5. Please describe any technical assistance needs you may have and list any information that you may need to support your work. What innovative procedures, solutions to common problems, etc. have you developed that may be suitable for sharing with other Integration Initiative projects? (Maximum: 250 words)</p>			
<p>6. Please attach your most current program logic model, incorporating feedback given by MeHAF staff or the evaluation consultant, if appropriate. (Please include a date on your Logic Model.) We will accept a logic model in any standard logic model format. A copy of the optional logic model template in Microsoft Word is attached and can be found at <a href="http://www.mehaf.org">www.mehaf.org</a>; Grant Center; Reporting and Forms.</p>			

7. Briefly describe involvement of patients/consumers/clients/family members in project design and implementation. (Maximum: 250 words)																
8. Describe any actions you have taken to foster sustainability of your project after MeHAF funding ends. (For example, billing for new types of services, institutionalizing integration within normal work routines, agency leadership prioritizing continuation/expansion of integration, etc.) (Maximum: 500 words)																
9. If your grant includes provision of clinical services, please address items <i>a</i> through <i>d</i> .																
a) List any new evidence-based screening or assessment tools or interventions which you have not previously reported in the Networking Survey or other narrative reports. Describe whether you have written protocols for use of these evidence-based tools/interventions. (Maximum: 250 words)																
b) If you changed one or more particular model of clinical integration on which your project is based, please list the new model(s) being used. Describe the extent to which your project follows the new model(s) listed. (Maximum: 250 words)																
c) Attach any <b>updates</b> to your patient flow chart(s). If your project includes multiple clinical sites, include a chart for each site. Planning grantees should provide an updated anticipated ideal flow chart, based on their current understanding of their planned project.																
d) Summarize staff education and training provided during this reporting period about evidence-based tools/interventions or integrated care. Complete the table below:																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Date/Type of training or education</th> <th style="width: 25%;">#/Profession of Participating Staff</th> <th style="width: 25%;">Length of Training (in hours)</th> <th style="width: 25%;">Reactions of staff trained</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Date/Type of training or education	#/Profession of Participating Staff	Length of Training (in hours)	Reactions of staff trained												
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**Financial Report**

Please fill out the Financial Report form (an EXCEL spreadsheet). The same form is used for both Interim and Final reports. Please also attach to the Financial Report form a brief budget narrative (500 words maximum) that describes any significant deviations (over 10% of your MeHAF request for the current budget year) from the original proposed budget.

**Work Plan Template**  
(Please add rows as needed)

<b>Objectives</b> (Describe your project in terms that are specific, measurable, achievable, realistic, and time-framed)	<b>Activities</b> (List the activities you will do to accomplish the objectives)	<b>Timeframe</b> (Show when you intend to do each activity)	<b>Responsible Party</b> (Describe who will accomplish each activity. You may list individuals from partner organizations with whom you will have a formal relationship)	<b>Progress</b> (Describe the extent to which you have accomplished grant activities and note the data sources you have used)
•	•	•	•	•

***Logic Model - Template in Word***

**Clients/Participants:**

