Grantee Orientation Training

April 2018

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Manager of Grants and Public Policy
Agenda and Objectives

• Welcome
• Grant Agreement
• Reporting Expectations
• Project Changes
• Acknowledgement of Support
• Upcoming Events
• Contacts
Congratulations and Welcome!

**Community Breast Health (CBH): 19**

- Patient Navigation: 12
- Support and Treatment: 6
- Education: 1
<table>
<thead>
<tr>
<th>Organization Name</th>
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<tbody>
<tr>
<td>Charles B. Wang Community Health Center</td>
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<tr>
<td>Community Health Project, Inc. d/b/a Callen-Lorde Community Health Center</td>
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<tr>
<td>Gilda's Club Westchester</td>
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<td>God's Love We Deliver</td>
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<tr>
<td>Haitian American Cultural and Social Organization</td>
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<tr>
<td>Korean Community Services</td>
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<tr>
<td>Long Island Jewish Medical Center</td>
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<tr>
<td>Memorial Sloan Kettering Cancer Center</td>
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<tr>
<td>Mount Sinai St. Luke's/ SHARE (Mount Sinai Health System)</td>
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<tr>
<td>New York Legal Assistance Group, LegalHealth Division</td>
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<tr>
<td>New York Presbyterian/Columbia</td>
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<tr>
<td>Open Door Family Medical Centers</td>
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<tr>
<td>Peconic Bay Medical Center</td>
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<tr>
<td>Planned Parenthood of Nassau County</td>
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<td>Project Renewal</td>
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<tr>
<td>St. John’s Riverside Hospital</td>
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<td>Staten Island University Hospital</td>
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<tr>
<td>The Family Center</td>
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<tr>
<td>Woodhull Medical and Mental Health Center</td>
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Komen’s Bold Goal

Reduce the current number of breast cancer deaths by 50% in the U.S. by 2026.
Core Values

• **Empower** - Knowledge is power: seek widely and share broadly
• **Innovation** - We are driven to be bigger, bolder, better
• **Impact** - Deliver excellence from ourselves and community partners
• **Service** - See a need, fill a need
• **Bold** - Embrace change and take reasoned risks
• **Integrity** - Efficiently and effectively steward the dollars entrusted to us
• **Inclusive** - Fiercely embrace all who race
• **Resilience** - Breast cancer is tough. We are too
• **Collaboration** - We race together
Purpose of Komen Community Grants

- Increase access and utilization of quality care to reduce late-stage breast cancer diagnosis and breast cancer mortality.
Breast Awareness Messaging

• Know Your Risk

• Get Screened

• Know What Is Normal For You

• Make Healthy Lifestyle Choices
Grant Agreement – Key Provisions

• Payment Terms
• Reporting Requirements
• Acknowledgements
• Notifications
Grant Agreement – Key Provisions

• Special Terms
• Restrictions on Use of Grant Funds
• Collaborating Organizations
• Indemnity
• Insurance
Grant Agreement Acceptance

Thank You

for completing the project scope modifications and acceptance/modifications of the contract within GeMS!
Payments

- First Payment: **April 13, 2018**

- Second payment: **November 7, 2018**

- Please go into GeMS right now and verify if the mailing address is correct because all grant payments will be mailed directly to the grantees
Reporting Requirements

- Reports are completed in GeMS
  - Mid-year Progress Report
    - April 1 – September 30 performance period
    - Due: October 31, 2018
  - Final Report
    - April 1 – March 31 performance period
    - Due: April 30, 2019
Reporting Requirements

• There is no longer a Work Plan Objectives page and Objectives will now populate on the Narrative page.

• Review 2018 Progress Report Template
Reporting Requirements

• **NEW!** Grantee GeMS Reporting and Tracking Tool
  
  o Use of this tool will assist grantees in tracking and reporting metrics that address the Bold Goal, such as
    - Quality of care
    - Time to/completion of care
  
  o Grantees will complete Service Entry tab in Excel spreadsheet and related reports will auto-populate
    - For easy entry into GeMS
Quick Review

- Workbook has three main components:

1. INSTRUCTION WORKSHEET
   - The workbook begins with instructions that provide notes, definitions, and any applicable links.

2. SERVICE ENTRY WORKSHEET
   - Where grantees enter ALL service data.

3. REPORT WORKSHEETS
   - Tallyes the results and provides reports summarizing all of the information entered into the service entry worksheet.
Quick Review

- **Individual ID** – for your tracking and entry purposes (confidential); column is frozen
- **Demographics** – must be entered for all individuals served except for provider trainings
- **Education** – all individuals who were educated through Komen grant; required to report on follow-up and action; can only list two most prominent topics
- **Trainings** – enter total number of providers trained per session versus individual entries; do not need to enter demographics
Quick Review

• **Clinical Services Received** – must be provided with Komen funding
  - **Screening** – patient’s first time to the facility; # of years since their last screening; facility’s accreditation; type of screening services received; screening results; referral to diagnostics; if screening led to diagnosis (not paid by Komen funding)
  - **Diagnosis** – range of time it took for patient to receive diagnostic services; facility’s accreditation; type of diagnostic services received; referral to treatment
  - **Treatment** – range of time it took for patient to begin treatment; facility’s accreditation; type of treatment services received; enrolled in clinical trial
Quick Review

- **Quality of Life Interventions aka Treatment Support** – durable medical equipment, psychosocial counseling, complementary and integrative therapies
- **Assistance Provided to Remove Barriers** – enables individuals to receive screening, diagnostics, or treatment services:
  - Transportation
  - Language services
  - Copay/deductible assistance
  - Childcare
  - Daily living expenses
Quick Review

- **Patient Navigation** – if Komen funds are used for diagnostic services but the navigator assisting the patient is funded by your organization, **DO NOT** enter navigation services data here
  - Community Navigation to Screening – time from referral to screening; facility’s accreditation; navigation led to diagnosis
  - PN from Abnormal Screening to Diagnostic Resolution – time from abnormal screening to diagnostic resolution; facility’s accreditation; diagnosed with breast cancer
Quick Review

• Patient Navigation cont’d
  o PN from Diagnostic Resolution Training through Treatment – time from diagnostic resolution to beginning treatment; facility’s accreditation; patient enrolled in clinical trial; individual completed recommended treatment plan; survivorship plan was provided; records were provided to PCP
  o Care Coordination and Case Management – PN funding was provided by organizations other than Komen, enter that information here
Quick Review

• Reports automatically populate

• Locked and cannot be altered

• Provide final totals that are identical to what needs to be reported in GeMS, referred to 2018 Progress Report Template
Roles

• Please double check if roles need to be reassigned:
  o Project Director
  o Authorized Signer
  o Viewer
  o Writer
1. The Project Director will login to GeMS
2. From the User Homepage, click the “My CG Applications” tab at the top of the page
3. Search for all applications in the status “Grant Awarded” and click “Execute”
4. Select the name of the application for which the progress or final report will be created
5. From the Application Snapshot page, hover over “Related Documents and Messages”
Report Creation

6. Select the name of the report you would like to create

7. Select “I Agree” to continue the creation of the report

8. The report menu will automatically open at this point
Report Completion

1. The Project Director will login to GeMS
2. From the User Homepage, select “Open My Tasks” under “My Tasks”
3. Select the report name of the progress or final report you would like to complete
4. Hover over “Forms Menu” to view/edit/complete the forms
5. Complete all of the report forms
Report Submission

1. The Project Director will login to GeMS
2. From the User Homepage, select “Open My Tasks” under “My Tasks”
4. Hover over “Status Changes”
5. Click “Apply Status” under “Authorized Signature Required”
Report Submission

6. The **Authorized Signer** will now login to GeMS
7. From the User Homepage, click on “Open My Tasks” under “My Tasks”
8. Select the report name in the status “Authorized Signature Required”
9. Review the report
10. Hover over “Status Changes”
11. Click “Apply Status” under “Progress Report Submitted”
Project Change Requests

• What kind of change requires a grant agreement amendment?
  o Budget changes exceeding ___% 
  o Changes to key personnel or consultants 
  o Changes to program delivery
    ▪ Coverage area (cannot go outside Affiliate service area) 
  o Eligibility criteria
Project Change Requests

• What kind of change requires a grant agreement amendment?
  o No cost extensions
    ▪ One per project, per year
    ▪ No longer than six months
    ▪ Must be requested at least 30 days prior to the end of the performance period
  o Adjustments to objectives
Project Change Requests – GeMS

Grantee

• Project Director changes the status to “Amendment Requested”
• Project Director completes the “Request for Grant Change” form
• Project Director changes the status to “Authorized Signature Needed for Amendment Submission”
• Authorized Signer reviews the request and changes the status to “Amendment Submitted”

Affiliate

• AGA reviews the “Request for Grant Change” form
• AGA completes the “Amendment Approval” form to record approvals and denials
• If amendment is approved, change the status to “Grant Amendment Approved”
• If the amendment is denied, change the status to “Rollback to Grant Awarded” (no further action necessary in GeMS and the “Request for Grant Change” form is deleted)
• If the “Request for Grant Change” requires changes, change the status to “Amendment Requested.”

Grantee

• Project Director makes the necessary changes to the Application forms to reflect the amendment request (budget, objectives, staff, narrative, etc., as necessary)
• Project Director changes the status to “Authorized Signature Required for Amendment Resubmission”
• Authorized Signer changes the status to “Amendment Resubmitted”

Affiliate

• AGA reviews application pages to ensure appropriate changes have been made.
• If changes are correct, AGA changes the status to “Grant Awarded”
• If changes are incorrect, AGA changes the status to “Amendment Modifications Required” and repeats previous steps
Site Visits

• Purpose
• **June, July, and August**
• What to expect
  o Format
  o Attendees (from the Affiliate and grantee)
  o Length of visit
Acknowledgement of Support

• Grantees should acknowledge Komen’s funding and support of this project

• Use of Komen’s name and logo must be approved in advance by the Affiliate
  o Include details on contact person/process to request approval
Branding Guidelines

• Our Name: Susan G. Komen® Greater NYC
  - There is no “the” before Susan G. Komen
  - Include ® on first reference only
  - We refer to ourselves as an organization, not a foundation
Press Release

• Template
Upcoming Events

• 2018 Impact Awards: Celebrating 28 Years of Impact
  o Wednesday, May 23, 2018 from 10AM – 2PM
  o Participation Form
  o One representative attend Community Partner Expo and attend the Luncheon as our guest
• Please let us know if you are attending or not 😊
Upcoming Events

• 2018 Race for the Cure!
  o Sunday, September 9, 2018
  o Education Expo
Upcoming Events

- New York Metastatic Breast Cancer Conference
  - Saturday and Sunday, October 27-28, 2018

- Patient Navigation Conference
  - Wednesday, February 6, 2019
Dates to Remember

- 2018 Impact Awards – May 23, 2018
- Q1 PN Progress Report – July 31, 2018
- 2018 Race for the Cure! – September 9, 2018
- NYMBCC – October 27-28, 2018
- Mid-year Progress Report – October 31, 2018
- Q2 PN Progress Report – October 31, 2018
- Second Payment – November 7, 2018
- Q3 PN Progress Report – January 31, 2019
- Patient Navigation Conference – February 6, 2019
- Final Report – April 30, 2019
- Final PN Report – April 30, 2019
Questions?

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