

Developmental Disabilities Planning Council

DDPC Quarterly Reports



Quarterly Report Cover Sheet

Grantee Instructions for Completing Quarterly Program and Expenditure Report

The quarterly report is the primary source of information on the progress of the grant. Therefore, it is important that grantees thoroughly document project activities, progress on meeting goals and objectives, and submit accurate data that reflects spending, participation, satisfaction, best practices, lessons learned, and plans for sustainability. Grantees are expected to submit timely quarterly reports throughout the contract period. The report should be submitted no later than 30 days after the end of each quarter. A report will only be considered on time when the report is received in its entirety.

If you have questions about completing this report, please contact DDPC staff: Drew Webster, drew.webster@ddpc.nv.gov

Quarterly Report Checklist: (Please make sure all of the below items are submitted by the report due date.)

- ☐ Cover Sheet with Signature and Date
- □ Quarterly Program Report
- ☐ Quarterly Expenditure Report
- ☐ Additional Documents (Expenditure documentation, Program Flyers, Pictures, Grant-Related Documents)

		Reporting Schedule y Reporting Schedule for this year.	
Quarter #	Reporting Period	Quarterly Report Due Date	
1	01/01/2021-03/31/2021	April 30, 2021	
2	04/01/2021-06/30/2021	July 31, 2021	
3	07/01/2021-09/30/2021	October 31, 2021	
4	10/01/2021-12/31/2021	January 31, 2022	

Grantee Program Information		
Project Title:	Contract Number:	
DDPC State Plan Goal:	DDPC State Plan Objective:	
Choose an item.	Choose an item.	
Reporting Year:	Reporting Quarter Number:	
Choose an item.	Choose an item.	
Reporting Period Dates:	Report Due Date:	
01/01/2021-03/31/2021	April 30, 2021	
Grantee Name and Address:	17 to 1/10	
St. John Fisher College		
3690 East Avenue, Rochester, NY 14618-3597		

Please sign and date below.

Report Submitted By (name and email address):	
Signature and Date:	ĺ

QUARTERLY PROGRAM REPORT | Email Submissions

Agenda

- Quarterly Report Overview
- Program Report
- Expenditure Report
- Summary



Quarterly Report: Overview



Quarterly Report Purpose

Program Report

Expenditure Report



Provides progress updates on meeting main objectives of grant



Provides summary of Quarterly grant expenditures to inform payment



Grantees can share successes and challenges with DDPC



Allows DDPC and grantee to monitor grant spending



Informs future work of the DDPC



Assists DDPC in determining level of funding for future grants

Quarterly Report Contents

- Cover Sheet
- Submission Directions (p. 2)
- Program Report
- Expenditure Report
- Backup & Additional Documents:

For example: fiscal documentation (receipts, payroll reports), promotional materials, photo releases, final reports, etc.





Quarterly Report: Cover Sheet



Quarterly Report Cover Sheet

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	Quarterly Report Below is the Quarterly Report				
Quarter #	Quarter# Reporting Period Quarterly Report Due Date				
1	07/01/2020-09/30/2020	October 31, 2020			
2	10/01/2020-12/31/2020	January 31, 2021			
3	01/01/2021-03/31/2021	April 30, 2021			
4	04/01/2021-06/30/2021	July 31, 2021			

Project Title:	Contract Number:		
DDPC State Plan Goal:	DDPC State Plan Objective:		
Choose an item.	Choose an item.		
Reporting Year:	Reporting Quarter Number:		
Choose an item.	Choose an item.		
Reporting Period Dates:	Report Due Date:		
Choose an item.	Choose an item.		

QUARTERLY PROGRAM REPORT | Grants Gateway



Developmental Disabilities Planning Council

Quarterly Report: Cover Sheet



Report Instructions



Quarterly Report Cover Sheet

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Checklist



Quarterly Report Checklist: (Please make sure all of the below items are submitted by the report due date.)

☐ Cover Sheet with Signature and Date

□ Quarterly Program Report

□ Quarterly Expenditure Report

☐ Additional Documents (Expenditure documentation, Program Flyers, Pictures, Grant-Related Documents)

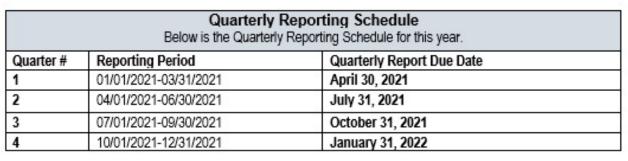


Quarterly Report: Cover Sheet

 Report Schedule



 Grant Program Information



Grantee Program Information		
Project Title:	Contract Number:	
DDPC State Plan Goal:	DDPC State Plan Objective:	
Choose an item.	Choose an item.	
Reporting Year:	Reporting Quarter Number:	
Choose an item.	Choose an item.	
Reporting Period Dates:	Report Due Date:	
01/01/2021-03/31/2021	April 30, 2021	



Quarterly Report: Directions



Quarterly Report: Submission Directions

1. Initiate a "Payment Request"



2. Fill out Payment Form in GGS



3. Label 4 QR documents (pdf files)

Program Report (PR)

Program Backup (PD)

Expenditure Report (ER)

Expenditure Backup (ED)



4. Submit Claim



Quarterly Program Report

Grantee Instructions for Submitting Quarterly Program and Expenditure Report
The following steps outline how to submit a payment request in the Grants Gateway System.

Initiating a Payment Request (claim):

- Login with any Grants Gateway role that can initiate a payment request. *
- 2. Click the 'Contracts' tab at the top of the page to locate the contract you want to initiate a payment for.
- On the Contract home page, click the 'Progress Reports and Related Documents' link, then click 'Initiate a payment'.
- 4. A new payment request will be created, and the user will be directed to the 'Payment main page.'

*Grantee, Grantee Contract Signatory, Grantee Payment Signatory, and Grantee System Administrator.

Filling out Grants Gateway Payment Forms:

- 1. Click on the 'Forms menu' and select 'Payment properties.'
- 2. Complete all required fields and click the save button (Payment type is 'Claim').
- On the 'Forms menu' select 'unitemized expenditure claim detail.' Fill out the required fields, using information from the DDPC Expenditure Detail Report. Click 'save'.

Required fields include: category subtotals (Grant funds and match) for Personal Services, Fringe Benefits, Contractual Services, Travel, Equipment, Space/Property/Utilities, Operating Expenses, and Other.

Uploading documentation:

- To upload supporting documentation (both program and fiscal) for the payment request, click on the 'Forms menu' and select "Payment Uploads." All documents must be saved and uploaded as nonfillable PDF's. (When saving as a PDF, ensure the document is readable. Illegible reports will be rejected and returned. Grantees will be expected to resubmit with legible documents.)
- Complete all required fields, enter a description of the upload, and attach the supporting documentation. Click save.

<u>Documentation includes</u>: Cover Sheet and Quarterly Program Report, Quarterly Expenditure Report, expenditure documentation, and program documentation.

When submitting the Quarterly report documents, please use the following naming convention: contract #, project title abbreviation, grant year, quarter, and report type. (The project title abbreviation can be found on the first page of your report (in parentheses next to the full project name)).

The following abbreviations should be used for each report document:

- Program report "PR"
- Supporting program documents (ex. photos, stories, etc.) "PD"
- Expenditure report "ER"
- 4. Supporting expenditure documents (receipts, invoices, etc.) "ED"

For example: The file name for the quarterly program report (this form) would be: Contract #, project title abbreviation, grant year, quarter, and PR: C001234_ABCD_y1q1_PR

Submitting Claim: (Please note, only a 'Grantee Payment Signatory' can certify and submit the final payment request.)

- A task will show in the Grantee Payment Signatory Role's Task box with a status of 'Payment in Process'. Click on the payment number, under name.
- To certify the Payment, click on the 'Uniterpized Claim Detail' link from the Forms Menu. Scroll to the Payee Certification section and click once on the 'Accept' radial button. Click 'save'.
- To submit the payment, hover over the 'Status Change' tab and click the 'Apply Status' button under the Payment Submitted label. Click the 'I Agree' button.'
- Send an email to DDPC contact listed on the cover page indicating payment has been submitted.

Note: For more detailed instructions on how to request/submit a payment, visit the Grants Management website at: https://grantsmanagement.ny.gov/request-payment

Quarterly Report: Program



Program Report: Overview

Sections:

- Summary of Activities and Outcomes
- People Being Served by or Participating in Grant Activities
- Systems Change Efforts
- Additional Information
 - Evaluation/Technical Assistance (Multi-grants only)
 - Grant Year in Review (Qtr. 4 only)



Program Report: Summary of Activities

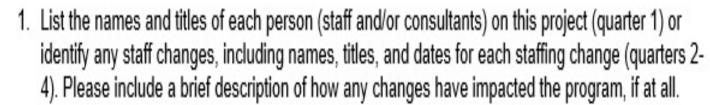
 Provide updates on project staff changes



Provide a brief
 overview of work
 completed during
 the reporting period



This section is meant to provide a brief overview of work completed during the reporting period. Information should not be a restatement of narrative provided in later sections, but instead should be a summary of overall efforts and activities.



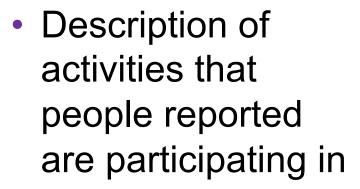
Click or tap here to enter text.

Please detail any major accomplishments, activities, or outcomes that you would like to highlight from efforts this quarter.

Click or tap here to enter text.

Program Report: People Served/Participating

Number of People Served or Participating





Each of the questions below relate to people being served by the grant or participating in grant activities during this quarter. Each question should be answered with as much detail as possible and include both quantitative (#'s) and qualitative data (narrative) where appropriate.



- How many people participated in or were served by grant activities, during this quarter? (Do not
 include participants reported for the same/similar activities in prior quarters. Individuals with ID/DD who are trained as part of grant
 activities should also be recorded in this question.)
 - Individuals with Intellectual and/or Developmental Disabilities (ID/DQ): Click or tap here to enter text.
 - Family members of individuals with ID/DD: Click or tap here to enter text.
 - Others (people other than individuals with ID/DD or family members): Click or tap here to enter text.

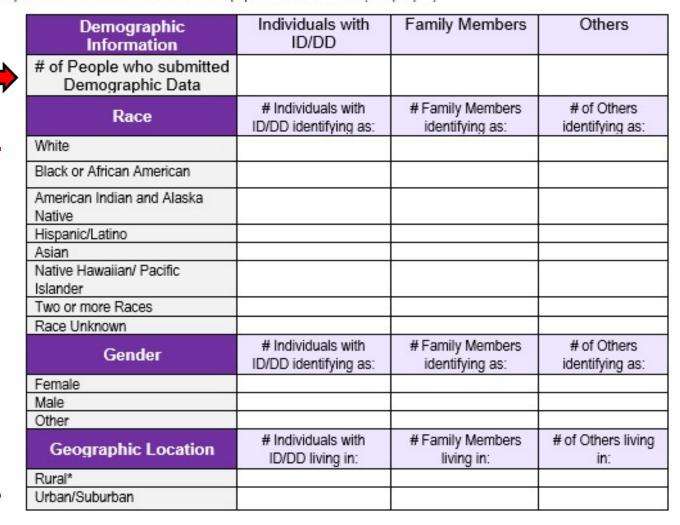


Please provide a detailed description of activities they participated in. Click or tap here to enter text.

Program Report: People Served/Participating

- Number of people submitting demographic information
- Demographic Information: Race, Gender, Geographic Location

Please provide demographic information for grant participants below.
 (All data should come directly from participants/be self-reported, and grantees should have documentation to support data being reported. *Rural refers to locations with a population of less than 2.500 people.)



Program Report: People Served/Participating

- Satisfaction data
- Outcomes Data :
 - Short term and long term
- Participant feedback
- Participant Success Stories

Why Should I Join NYS Partners in Policymaking®?

"Partners gave me the motivation to make proactive positive changes, instead of settling for status quo."

"I am more knowledgeable and confident in my advocacy efforts." "I have been more involved in policy changes, as well as changes in my own life. I am more independent because of the Partners program."

Program Report: Systems Change Efforts

Description of systems change efforts

Cultural Competency Efforts



Systems Change Efforts by Grantee

The following questions ask about grant systems change efforts during the reporting period. Systems change efforts and activities are those that are sustainable, transferable, and replicable in some aspect of design and/or delivery of services and supports. Systems change efforts are intended to promote positive and meaningful outcomes for individuals with ID/DD and their families on an entity, community, state, or federal level. Please answer each question with as much detail as possible.

- 10. Please provide an overview of any systems change activities that have occurred during this reporting period based on activities of the grant. Systems change activities can include any of the following:
 - Creation of, improvements to, implementation of any organizational internal policies, services, or business actions.
 - Creation of, improvements to, implementation of any local/state level public policies.
 - Creation of, improvement to, implementation of any new or innovative approaches, practices, trainings, models.
 - A change or improvement of any regulations or statutes.

 Please report any progress you have made towards cultural competency efforts in this quarter. (For example: staff training, outreach to diverse communities, translation of documents.)

Click or tap here to enter text.

Program Report: Additional Information

- Questions for you to report:
 - Barriers/challenges
 - Needs/assistance required
 - Dollars leveraged
 - Next Quarter Activities
 - Project materials, Products, Photos
- Sustainability Efforts: Providing quarterly updates on sustainability activities



Program Report: Remaining Sections

- Evaluation/Technical Assistance Section
 - Only for some grants
 - Updates on collaborative activities & relationship
- Grant Year in Review Section
 - Qtr. 4 of each year, only
 - Overview of activities for the year, including:
 Challenges faced, lessons learned,
 recommendations, adjustments sought, sustainability.



Program Report: Additional Fiscal Info

Updates on challenges with spending/match

Additional Fiscal Information

 Please provide an update on any challenges you have encountered spending grant funds or meeting match requirements.

Click or tap here to enter text.

- Dollars leveraged
- 2.) Did you leverage any dollars (receive additional money or in-kind support), outside of match requirements, to help implement the grant during this quarter? If so, please provide the amount and a brief description. (For example, did an organization donate space for grant use this quarter?)

Dollars Leveraged: \$ Click or tap here to enter text.

Description:

Click or tap here to enter text.

Questions?



Expenditure Report: Overview

- Expenditure Detail Report
- Supporting Documentation
- Additional Fiscal Information

Expenditure Report: Form

Contract
 Information

Summary

DEVELOPMENTAL DISABILITIES PLANNING COUNCIL EXPENDITURE DETAIL REPORT AGENCY: Quarterly Expenditures VENDOR ID: 100000000 CONTRACT#: C99999GG PROJECT START DATE: 1/1/19 CURRENT YEAR START DATE: 1/1/19-12/31/19 PROJECT YEAR: 1 2 3 4 REPORTING QUARTER: 1 2 3 4 5 REPORTING TIME PERIOD: 1/1/19-3/31/19 PROJECT TITLE: Expenditure Reporting Guidance EXPENDITURE SUMMARY TOTAL EXPENDITURES TOTAL REPORTED **EXPENDITURES** TOTAL TOTAL TOTAL APPROVED **PERVIOUS** REPORTED THIS EXPENDITURES UNSPENT GRANTEE UNSPENT EXPENDITURE CATEGORY DDPC BUDGET | GRANTEE BUDGET BUDGET QUARTER(S) QUARTER TODATE DDPC SHARE SHARE I. PERSONAL SERVICES 30,000 a) Salary 19,000 49,000.00 0.00 0.00 30,000,00 19,000,001 49,000.00 9,500,00 24,500,00 b) Fringe Benefits 15,000 24,500,00 0.0015,000.00 2. NON PERSONAL SERVICES a) Contractual Services 18,000 18,000.00 0.00 0.00 0.00 18,000.00 0.00 18,000.00 2,000.00 b) Travel 2.000 2,000.00 0.00 0.00 0.00 2,000.00 0.00 c) Equipment 0.00 0.00 0.00 0.00 Space/Property & Utilities 0.00 0.00 0.00 0.00 0.00 2.500 0.00 0.00 2,500.00 2,500.00 e) Operating Expenses 2,500.00 0.00 7.508.00 f) Other 7,500 3,750 11,250.00 0.00 0.00 3,750.00 11,250.00 \$32,250 107 250 00 0.00 75,000,00 | 32,250,00 | 107,250,00 TOTAL \$75,000 Otr 5 NA

Quarter Tabs

Expenditure Report: Form

- Quarterly expenses
 - DDPC Share
 - Grantee Share

	XPENDITURE	DETAIL REPORT		
AGENCY: Quarterly Expenditures	VENDOR ID: 1000		CONTRACT#: C99999GG	
PROJECT START DATE: 1/1/19		ART DATE: 1/1/19-12/31/19	PROJECTYEAR:1 2 3 4 5	
REPORTING QUARTER: 1 2 3 4 5	REPORTING TIME F	PERIOD: 1/1/19-3/31/19		
	EXPENDI	TURE DETAIL		
EXPENDITURE		DDPC SHARE	GRANTEE SHARE	TOTAL
PERSONAL SERVICES	75			,
Title			15	
Project Director				0.00
Project Coordinator				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
SUBTOTAL		0.00	0.00	0.00
FRINGE BENEFITS				
Title				
Project Director				0.00
Project Coordinator	0.0			0.00
C				0.00
<u> </u>				0.00
C				0.00
0				0.00
SUBTOTAL	1	0.00	0.00	0.00
		0.00	3.00	5.00
CONTRACTUAL SERVICES				
Check# Date of Check	Vendor			
	Translation			0.00
				0.00
				0.00
	10-			0.00

Expenditure Report: Supporting Documents

- Supporting Documentation:
 - Receipts
 - Vouchers
 - Payroll
 - Invoice(s)



 Any additional documents that support expenses being reported



In Summary

Program Report

- Overview of work during reporting period
- Demographic data, Satisfaction Data, & Success Stories, Sustainability

Expenditure Report

- Overview of expenditures during reporting period
- Supporting Documentation for expenses

Questions?

If you have further questions check out our other TA documents on SharePoint and/or contact your designated DDPC Staffer.



