

# Status Report

## Workshop

June 17, 2020



**Marillac  
Mission Fund**

# Welcome and Reflection

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# MMF Team



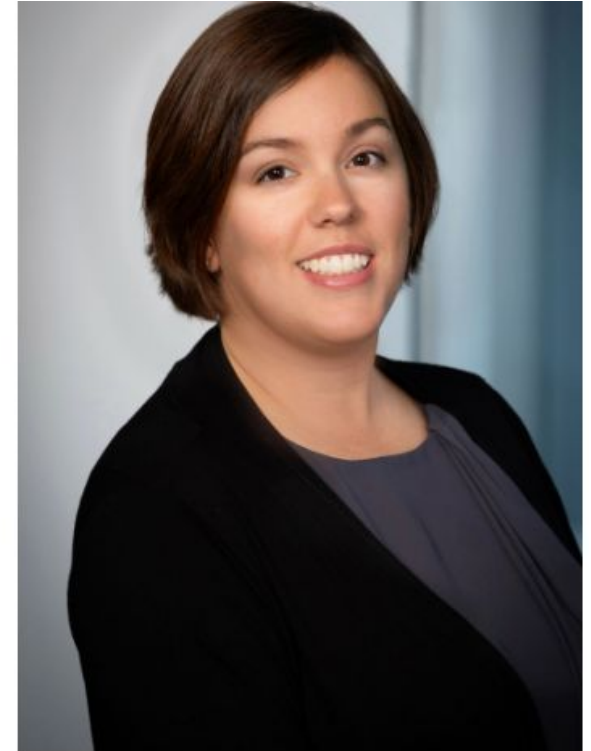
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# Spring 2020 MMF Grantees

Human Trafficking (4)  
Immigrant/Refugee (7)  
Older Adults (18)  
Veterans (1)

Bilingual International Assistant Services (BIAS)

College Hill Foundation\*

Collinsville Faith in Action

Covenant House Missouri

Disability Resource Association, Inc.

Five Star Senior Center, Inc.

Healing Action Network, Inc.

Health Protection and Education Service

HealthVisions Midwest

Housing Options Provided for the Elderly (HOPE)

Immigrant & Refugee Women's Program

Independence Center

L'Arche St. Louis\*

Memory Care Home Solutions

Mission: St. Louis

Nurses for Newborns Foundation

PEACE Weaving Wholeness NORC\*

Project Present\*

Saint Louis Crisis Nursery

Shepherd's Center of Webster-Kirkwood

St. Francis Community Services

St. John's Healing Community Board

St. Louis Society for the Blind and Visually Impaired

Sts. Joachim & Ann Care Service

The Covering House

The Youth and Family Center

Under the Same Tree

Vision for Vets\*

Warren County Fine Arts Council\*

Youth In Need

\* denotes new MMF grantee

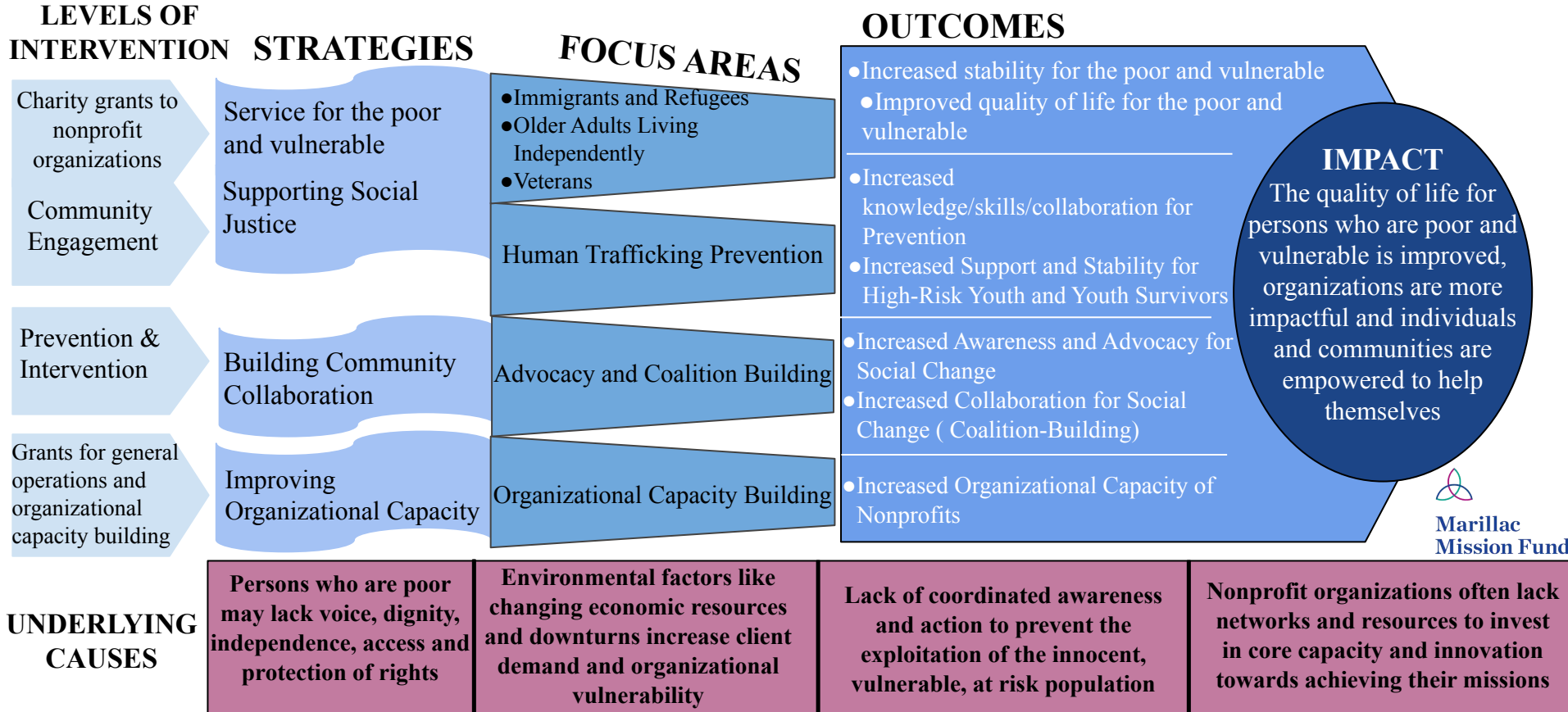


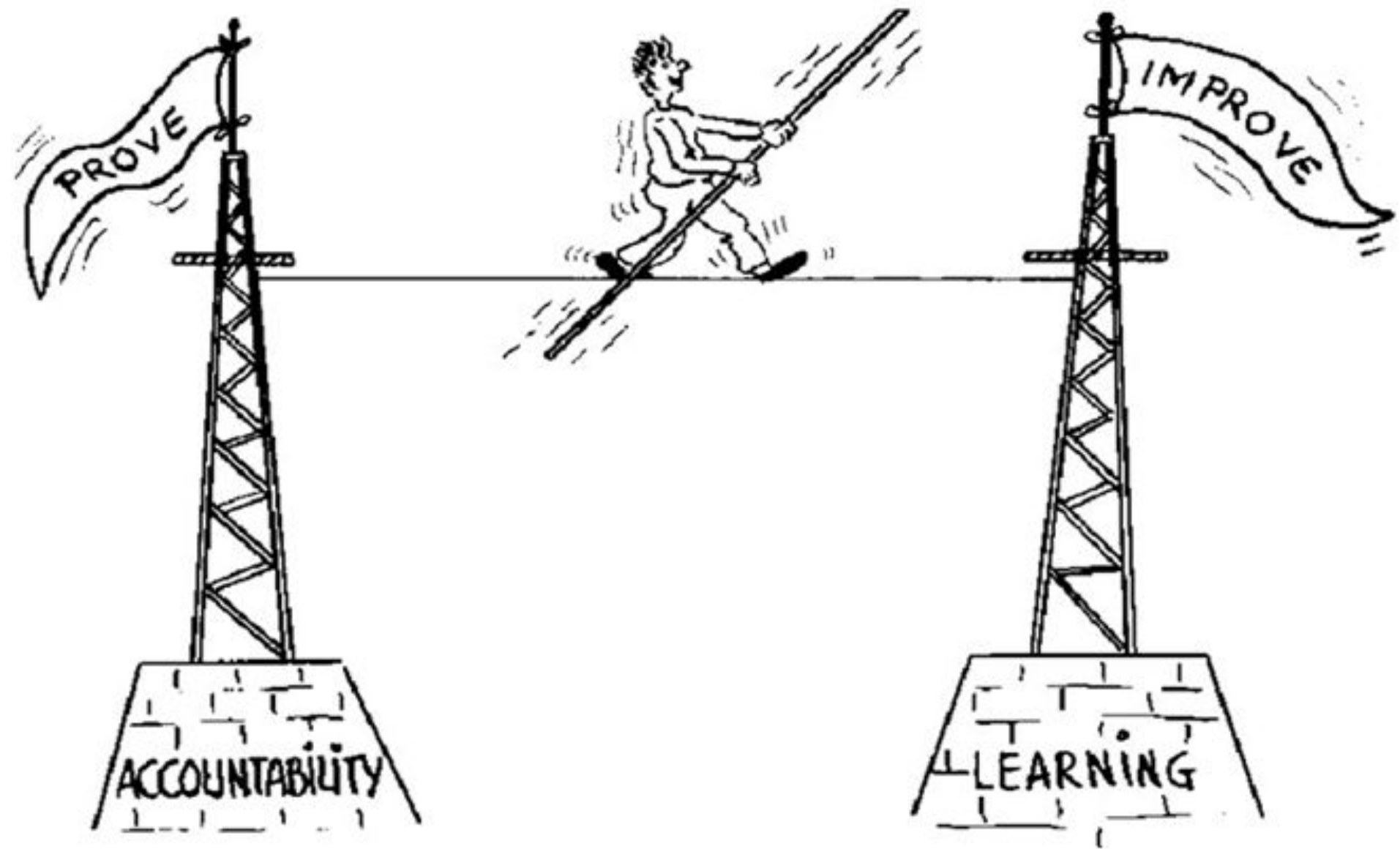
# Mission & Purpose

- **Mission:** Rooted in the loving ministry of Jesus as healer, the Fund is committed to serving persons who are poor and vulnerable.

## THEORY OF CHANGE

The Marillac Mission Fund (MMF) believes in the intrinsic value and dignity of persons who are poor and vulnerable. Through their unique ability to care for, engage and empower people to be active on their own behalf, nonprofit organizations serve as catalysts for positive, substantive change in conditions that improve the quality of life and empower individuals and communities to advocate for themselves. Therefore, the foundational premise for MMF’s work is to support and partner in efforts to care for and empower the economically disadvantaged through funding grants, community engagements, research and advocacy.





Source: Terry Smutyla & Daniel Morales-Gomez

# Status Report Review





# Grant Agreement

- Grant period = 12 month (or 18 month)
- Final Status Report due May 31, 2021
  - Mid-year reports for some
- Unexpended grant funds: Notify us ASAP!
- Keep us informed of changes
- MMF must review grant-related communications prior to publication

# Our “Why” - Understanding Impact

- **MMF Evaluation Framework**
  - Identifies outcomes and indicators aligned to MMF’s mission
  - provides space for autonomy
  - helps agencies communicate impact
- *Feel free to include outcomes tracked for other funders...Brag!*

# Our “How” - MMF User’s Guide

- **REQUIRED READING!**
- Explains MMF’s Evaluation Framework and definitions of terms
- Organized by focus area
- For each indicator, the User’s Guide contains:
  - definition of intent for the indicator
  - examples of related services
  - recommended metrics
  - sample tools (not required, but if used, \*note copyright)


# Outcomes and Indicators: Highlights

- Two Required Outcomes:
  1. Increased Stability
  2. Improved Quality of Life
- Select two indicators per outcome
- Progress, not perfection!
  - Intent is to document/measure appropriate changes in clients' conditions as they receive services

# Our “What” - Final Status Report

- Due **May 31, 2021**
    - Assignee receives 45-day reminder
  - Use the [online GLM system](#) to submit
  - Assigned to your org’s *Primary Contact* (likely the Executive Director)
  - Only the assignee can view/edit the report
    - Keep the login info on hand
    - Keep MMF informed of staff changes
- “How To” details sent via email

# Status Report Location in GLM

 If your organization information does not appear correct, please contact the funder. Thank you.

Active Requests **1**

Historical Requests **3**

Agency ABC

Process: Responsive Grant FY 2019

Application Submitted 01/31/2019  
Decision Approved 04/24/2019

[View Application](#)

## Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Final Status Report - Follow Up Form - FY2019	Jane Doe	Overall Award	06/30/2020 11:45 PM CDT	Assigned	<a href="#">Edit</a>

## Documents uploaded by Administrator

DESCRIPTION	FILE
Award Letter Spring 2019	<a href="#">Program.pdf</a>
Signed Grant Agreement Spring 2019	<a href="#">Spring 2019 Grant Agreement.pdf</a>

# Final Status Report Components

- **Grantee Information** - auto-filled from application
- **Grant Narrative** - # served, agency objectives, challenges, lessons learned, experience with evaluation
- **Financial Report**
- **Evaluation Report** - for 4 Indicators
- **Demographics Served** - race and *zip codes (new)*
- **Electronic Signatures** - ED and report preparer

# New Narrative Questions

## **Total Number of Unduplicated/Unique Clients Who Completed the Project/Program\***

Please enter the total number of (unduplicated) clients served with MMF funds who completed the project/program as intended during the grant period. For General Operating grants, provide the total number served by the organization.

**Q6. How did your evaluation process change from the plan submitted, if at all?**

**Q7. What alliances or partnerships, if any, were instrumental to the success of the project/program?**

**Q8. Looking back over the past grant period, what are you most proud of?**

**Q9. What trends are you seeing that are affecting the communities served?**

## **Explain Other Race Identified**

Provide a brief explanation of the races included in the "Other" category. If your organization tracks additional ethnic groups beyond those listed here, please feel free to include that information here (e.g., 'Bosnian- 20').



# Financial Accounting - Budget Template

<i>Insert Agency Name Here</i>	Status Report Financial Accounting		
Expenses	Total Project Expenses	Proposed to MMF	Actual MMF Funds Expended
Salary and Benefits	\$ -	\$ -	\$ -
Contract Services (consulting, professional, fundraising)	\$ -	\$ -	\$ -
Occupancy (rent, utilities, maintenance)	\$ -	\$ -	\$ -
Training & Professional Development	\$ -	\$ -	\$ -
Insurance	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ -
Supplies	\$ -	\$ -	\$ -
Printing, Copying & Postage	\$ -	\$ -	\$ -
Evaluation	\$ -	\$ -	\$ -
Marketing	\$ -	\$ -	\$ -
Conferences, meetings, etc.	\$ -	\$ -	\$ -
Administration	\$ -	\$ -	\$ -
Other - _____	\$ -	\$ -	\$ -
Other - _____	\$ -	\$ -	\$ -
<b>TOTAL EXPENSES</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

# Financial Accounting - Narrative

<p style="text-align: center;"><i>Insert Agency Name Here</i></p>	<p style="text-align: center;"><b>FINANCIAL NARRATIVE For Funds Expended from MMF (Must Accompany Status Report Financial Document)</b></p>
<p style="text-align: center;"><b>Line Item/Amount</b></p>	<p style="text-align: center;"><b>Explanation</b></p>
Salary and Budget	25% of Teacher salaries & fringes for one year (On Budget)
Contract Services	Services translate the parent handbook into common language. Used funds from lower than budgeted training and supplies (see below)
Training and Development	Tuition for Teacher course work for health literacy (lower expenses vs budget offset higher Contract Services for translation services). Took courses online
Supplies	Lower expenses offset higher translation services above (See Contract Services) line item

# Financial Accounting for General Operating Support (GOS) Grants

Complete only the bottom half of the Status Report Financial Accounting Form

Also, YTD agency financials for May 1, 2020-April 30, 2021 **and** May 1, 2019-April 30, 2020:

- Statement of Financial Position/Balance Sheet
- Statement of Activities/Income and Expense Statement

Revenues	Committed	Pending	Received
<b>Contributions, Gifts, Grants, &amp; Earned Revenue</b>			
Local Government	\$ -	\$ -	\$ -
State Government	\$ -	\$ -	\$ -
Federal Government	\$ -	\$ -	\$ -
Individuals	\$ -	\$ -	\$ -
*Foundation - _____	\$ -	\$ -	\$ -
*Foundation - _____	\$ -	\$ -	\$ -
*Corporation- _____	\$ -	\$ -	\$ -
*Federation- _____	\$ -	\$ -	\$ -
*Other - _____	\$ -	\$ -	\$ -
Membership Income	\$ -	\$ -	\$ -
Program Service Fees	\$ -	\$ -	\$ -
Products	\$ -	\$ -	\$ -
Fundraising Events (net)	\$ -	\$ -	\$ -
Investment Income	\$ -	\$ -	\$ -
In-Kind Support	\$ -	\$ -	\$ -
*Other - _____	\$ -	\$ -	\$ -
<b>TOTAL REVENUES</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

# NEW Evaluation Plan & Report Template

What tool will you use to measure this indicator (your own or one of the samples on the website)?	When will this tool be used with your clients?	How will you analyze the results to show the change (increase, improvement, etc.) defined by the indicator?	What system will you use to manage/ computerize and analyze your evaluation data?	How will you determine that a client has achieved this indicator? (Ex: "Clients will achieve this indicator if they have lower post-test scores than pre-test scores on the ABC Depression Index.")	Anticipated Outcome (include # of clients to achieve indicator, and any other quantifiable results expected)	Actual Outcome (to be reported at the time of Final Status Report)
	<input type="checkbox"/> Pre/post <input type="checkbox"/> Post-only <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Other (please explain):	<input type="checkbox"/> Compare post results to pre results  <input type="checkbox"/> Analyze changes (decreases/increases) at each time the data is collected/each time the tool is completed  <input type="checkbox"/> Include retrospective pre/post (comparison) questions on post-only surveys  <input type="checkbox"/> Staff verified with clients or providers that all services were received by those who attained this outcome.  <input type="checkbox"/> Other (please explain):	<input type="checkbox"/> Excel <input type="checkbox"/> Survey Monkey  <input type="checkbox"/> Social Solutions/ ETO  <input type="checkbox"/> Apricot  <input type="checkbox"/> External Evaluator  <input type="checkbox"/> SPSS  <input type="checkbox"/> Hand tabulation  <input type="checkbox"/> Other (please explain):			

Simply complete 2 new columns to the right side of the Evaluation Plan that you submitted in the application to compare Anticipated Outcomes to **Actual Outcomes** in your final status report. Only upload one document with a report page for each of your indicators (total of 4 indicators).

# NEW Evaluation Plan & Report: Example

**OUTCOME 1 (Increased Stability):** Please type/write in your indicator for this outcome on the line below.

## (1a) Increased Access to Needed Community Resources

What tool will you use to measure this indicator (your own or one of the samples on the website)?	When will this tool be used with your clients?	How will you analyze the results to show the change (increase, improvement, etc.) defined by the indicator?	What system will you use to manage/computerize and analyze your evaluation data?	How will you determine that a client has achieved this indicator? (Ex: "Clients will achieve this indicator if they have lower post-test scores than pre-test scores on the ABC Depression Index.")	Anticipated Outcome (include # of clients to achieve indicator, and any other quantifiable results expected)	Actual Outcome (to be reported at the time of Final Status Report)
Participation/Use Tracker	<input type="checkbox"/> Pre/post <input type="checkbox"/> Post-only <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input checked="" type="checkbox"/> Other (please explain): When clients attend or access referred programs and/ or services	<input type="checkbox"/> Compare post results to pre results <input type="checkbox"/> Analyze changes (decreases/increases) at each time the data is collected/each time the tool is completed <input type="checkbox"/> Include retrospective pre/post (comparison) questions on post-only surveys <input checked="" type="checkbox"/> Staff verified with clients or providers that all services were received by those who attained this outcome. <input type="checkbox"/> Other (please explain):	<input type="checkbox"/> Excel <input type="checkbox"/> Survey Monkey <input type="checkbox"/> Social Solutions/ ETO <input checked="" type="checkbox"/> Apricot <input type="checkbox"/> External Evaluator <input type="checkbox"/> SPSS <input type="checkbox"/> Hand tabulation <input type="checkbox"/> Other (please explain):	Clients will achieve this indicator if they participate in or access programs or services to which they were referred by the case manager.	75% (225/ 300) of clients will participate in/access the programs/services referred by the case manager.	80% (228/285) of clients participated in/accessed programs/services referred by the case manager.

# Reporting on Indicators

**Q1. List the number of clients with completed evaluation data for this indicator. (O1,I1)\***

How many clients completed your tool(s), or how many clients were included in your data collection utilizing your tool?

**Q2. List the number of clients that achieved this indicator. (O1,I1)\***

How many clients achieved this indicator according to your evaluation data? (this number should match the number in the final column on the Evaluation Report for this indicator)

**Q3. If the definition of a client achieving the indicator differed from the original evaluation plan, share the update here.**

**Q4. Feel free to include any additional details regarding this indicator (optional)**

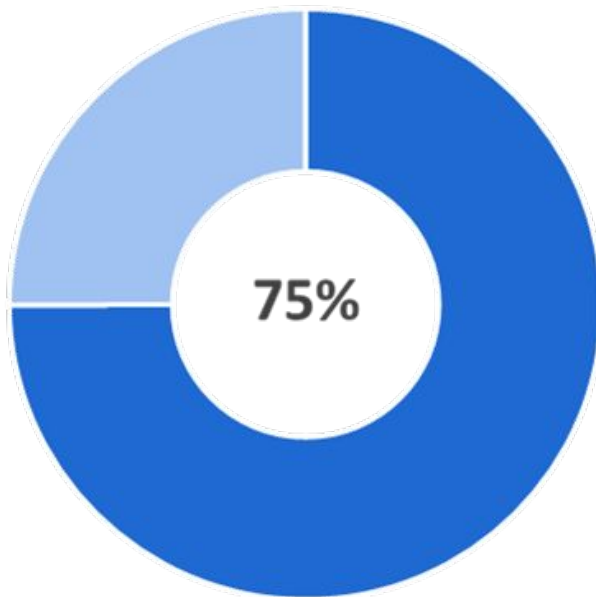
- These four questions are asked for **each** indicator
- Give us *real* data, please!

# \*Note about the Community Resources Indicator

- Clients self-reporting that they know more/learned more about community resources is not good enough! (Exceptions may be made for legal services and home repairs.)
- # of Referrals is not sufficient
  - Clients must follow through and receive services from OUTSIDE the agency
- If this is not feasible for your agency to report, please choose a different indicator.

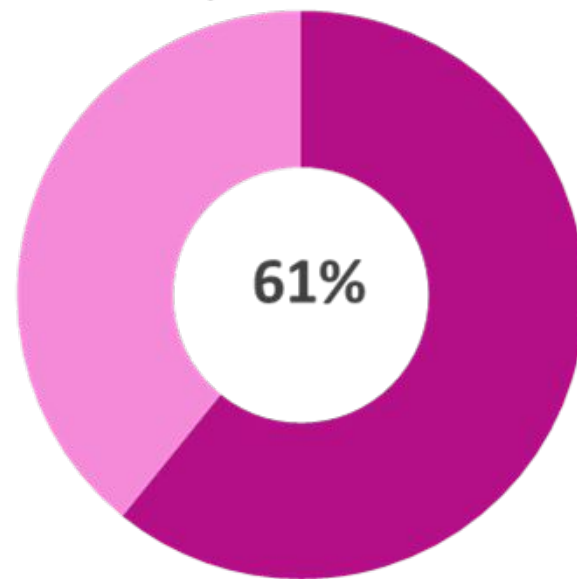
# Dashboard Fall FY2019

Increased Stability- All Focus Areas



Total # evaluated: 2,767

Improved Quality of Life- All Focus Areas



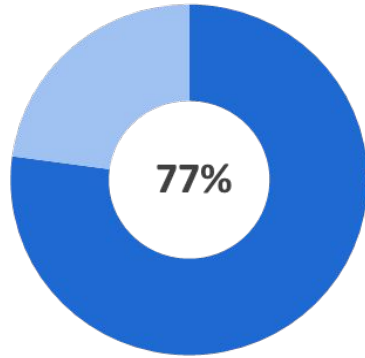
Total # evaluated: 2,311

**18 agencies reporting**



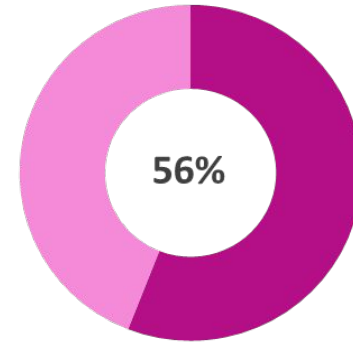
# Dashboard continued

Increased Stability of Immigrants



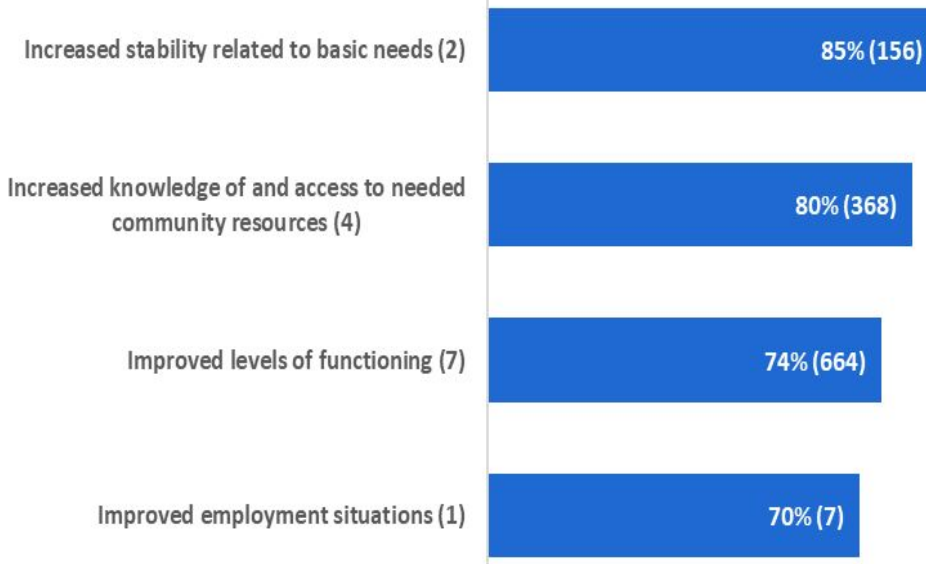
Total evaluated: 1,549

Improved Quality of Life for Immigrants

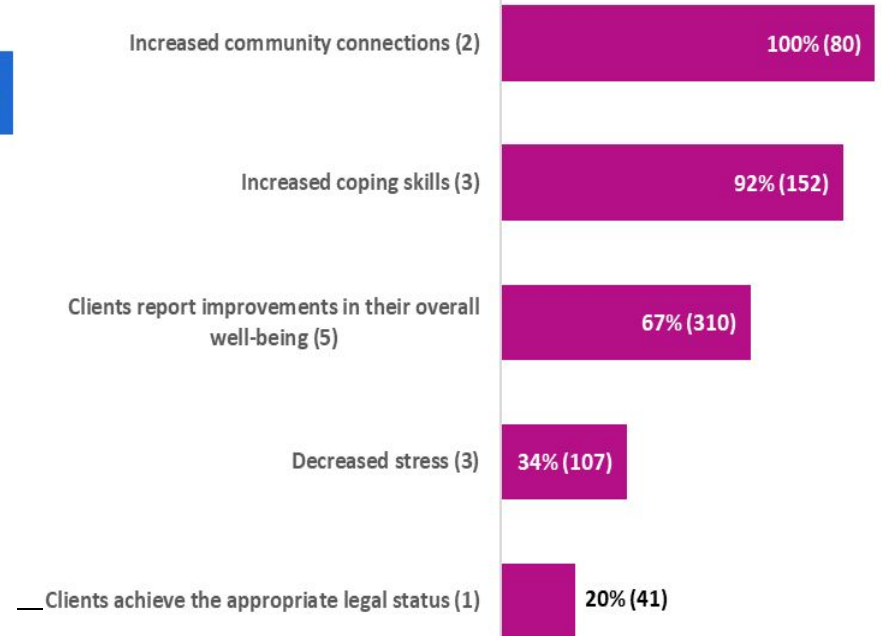


Total evaluated: 1,233

Increased Stability for Immigrants














Improved Quality of Life for Immigrants



# Evaluation Plan - Final Points

- Ensure that everyone involved with implementing the grant (ex: program staff) are familiar with the Evaluation Plan!
- Some Evaluation Plans were revised, so be sure to upload the final version

# Resources: [marillacmissionfund.org](http://marillacmissionfund.org)

	Evaluation Plan	Responsive Grants
	Outcomes and Activities Format- Discretionary Grants	Discretionary Grants
	Proposal Workplan- Capacity Building Grants	Capacity Building
	Proposal Workplan- Discretionary Grants	Discretionary Grants
	Proposal Workplan- Responsive Grants	Responsive Grants
	Sample Evaluation Report Template	Responsive Grants Status Report
	Status Report Financial Accounting	Responsive Grants Discretionary Grants Status Report
	Status Report Workplan and Financial Accounting Capacity Building	Capacity Building Status Report
	Status Report Workshop Slides	Responsive Grants Status Report
	Status Report- Blank Evaluation Report Template	Responsive Grants Status Report
	Users Guide	Responsive Grants



# Small Group Sharing

# Small Group Sharing

- Briefly introduce yourself and your role.
- Describe the MMF grant project/program.
  - Include if/how COVID-19 is forcing adaptations
- Describe your organization's approach to evaluating the indicators selected in the MMF grant.
- Can you share one or some of the tools you will be using to capture the data?
- How do you collect and interpret your data?

**Questions?**

# Closing

- A feedback survey is available now at [this link](#). Please complete it as soon as possible.
- This workshop will be recorded and posted on our website.
- Our staff are always here to help.

*Thank you for responding to the needs of those who are  
poor and vulnerable!*