



STATE OF NORTH CAROLINA
DEPARTMENT OF HEALTH AND HUMAN SERVICES

JOSH STEIN
GOVERNOR

DEVDUTTA SANGVAI
SECRETARY

January 17, 2025

SENT VIA ELECTRONIC MAIL

Mr. Brian Matteson, Director
Fiscal Research Division
Suite 619, Legislative Office Building
Raleigh, NC 27603-5925

Dear Director Matteson:

Session Law 2023-134, Section 9B.1 requires the Department of Health and Human Services to report to the Joint Legislative Oversight Committee on Health and Human Services and the Fiscal Research Division all reports received under 9 NCAC 03M .0205 from non-State entities, as defined in G.S. 143C-1-1, that are recipients of nonrecurring funds allocated as a directed grant for the 2023-2024 fiscal year. Pursuant to the provisions of law, the Department is pleased to submit the attached report.

Should you have any questions regarding this report, please contact Karen Wade, Director of Policy, at Karen.Wade@dhhs.nc.gov.

Sincerely,

DocuSigned by:
A handwritten signature in blue ink that reads "Clarlynda Williams-Devvane".
on behalf of Devdutta Sangvai
33023E3C927E460...
Devdutta Sangvai
Secretary



STATE OF NORTH CAROLINA
DEPARTMENT OF HEALTH AND HUMAN SERVICES

JOSH STEIN
GOVERNOR

DEVDUTTA SANGVAI
SECRETARY

January 17, 2025

SENT VIA ELECTRONIC MAIL

The Honorable Carla Cunningham, Chair
Joint Legislative Oversight Committee on
Health and Human Services
North Carolina General Assembly
Room 403, Legislative Office Building
Raleigh, NC 27603

The Honorable Donny Lambeth, Chair
Joint Legislative Oversight Committee on
Health and Human Services
North Carolina General Assembly
Room 303, Legislative Office Building
Raleigh, NC 27603

The Honorable Larry Potts, Chair
Joint Legislative Oversight Committee on
Health and Human Services
North Carolina General Assembly
Room 307B1, Legislative Office Building
Raleigh, NC 27603

Dear Chairmen:

Session Law 2023-134, Section 9B.1 requires the Department of Health and Human Services to report to the Joint Legislative Oversight Committee on Health and Human Services and the Fiscal Research Division all reports received under 9 NCAC 03M .0205 from non-State entities, as defined in G.S. 143C-1-1, that are recipients of nonrecurring funds allocated as a directed grant for the 2023-2024 fiscal year. Pursuant to the provisions of law, the Department is pleased to submit the attached report.

Should you have any questions regarding this report, please contact Karen Wade, Director of Policy, at Karen.Wade@dhhs.nc.gov.

Sincerely,

DocuSigned by:

A handwritten signature in black ink that reads "Clarlynda Williams-Devvane".
on behalf of Devdutta Sangvai
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Devdutta Sangvai
Secretary

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Reports by Non-State Entities on the Use of Directed Grant Funds

Session Law 2023-134, Section 9B.1



**Report to the
Joint Legislative Oversight Committee on
Health and Human Services**

and

**The Fiscal Research Division
by**

North Carolina Department of Health and Human Services

January 17, 2025

BACKGROUND

Session Law 2023-134, Section 9B.1 directs the Department of Health and Human Services to submit to the Joint Legislative Oversight Committee on Health and Human Services and the Fiscal Research Division all reports received by non-state entities on their use of directed grant funds.

REPORTS BY NON-STATE ENTITIES ON THE USE OF DIRECTED GRANT FUNDS

SECTION 9B.1. The Department of Health and Human Services shall submit to the Joint Legislative Oversight Committee on Health and Human Services and the Fiscal Research Division all reports received under 9 NCAC 03M .0205 from non-State entities, as defined in G.S. 143C-1-1, that are recipients of nonrecurring funds allocated in this Part as a directed grant according to the following schedule:

- (1) By November 1, 2024, all reports on the use of directed grant funds received under this Part for the 2023-2024 fiscal year.
- (2) By November 1, 2025, all reports on the use of directed grant funds received under this Part for the 2024-2025 fiscal year.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ABC of NC Child Development Center
Recipient Tax ID #	30-0111894
Project/Activity Title:	Autism Early Intervention Model Program
Reporting Period (Quarter):	1
Report Completion Date:	10.10.2023
Preparer of This Report:	Selene Johnson, Executive Director

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

ABC of NC served 13 children in the intensive early intervention program and offered, on average, 2.66 autism-specific parent/caregiver classes each month. We also provided quarterly team meetings, home visits, or virtual visits for parents/caregivers.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We anticipate that we will meet the expectations outlined in our Deliverables/Outputs and our Expected Outcomes. Final assessments will be completed during the 4th quarter for final reporting on all objectives and measures.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 91,526.76	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,997.58	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,534.39	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 1,554.57	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,553.70	\$
Other Expenses (Specify): Insurance, Background checks, medical testing	\$ 833.00	\$
Total Expenses:	\$ 100,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 91,526.76	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,997.58	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,534.39	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 1,554.57	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,553.70	\$
Other Expenses (Specify): Insurance, Background checks, medical testing	\$ 833.00	\$
Total Expenses:	\$ 100,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ABC of NC Child Development Center
Recipient Tax ID #	30-0111894
Project/Activity Title:	Autism Early Intervention Model Program
Reporting Period (Quarter):	2
Report Completion Date:	01.09.2024
Preparer of This Report:	Selene Johnson, Executive Director

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

ABC of NC served 13 children in the intensive early intervention program and offered, on average, 3 autism-specific parent/caregiver classes each month (Oct=4; Nov=3; Dec=2). We also provided quarterly team meetings, home visits, or virtual visits for parents/caregivers.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We anticipate that we will meet the expectations outlined in our Deliverables/Outputs and our Expected Outcomes. Final assessments will be completed during the 4th quarter for final reporting on all objectives and measures.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 91,526.76	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,719.24	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,233.86	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 1,515.72	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,413.97	\$
Other Expenses (Specify): Insurance, Background checks, medical testing	\$ 1,590.45	\$
Total Expenses:	\$ 100,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	200,000.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 183,053.52	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 3,716.82	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 2,768.25	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 3,070.29	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,967.67	\$
Other Expenses (Specify): Insurance, Background checks, medical testing	\$ 2,423.45	\$
Total Expenses:	\$ 200,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ABC of NC Child Development Center
Recipient Tax ID #	30-0111894
Project/Activity Title:	Autism Early Intervention Model Program
Reporting Period (Quarter):	3
Report Completion Date:	04/11/2024
Preparer of This Report:	Selene Johnson, Executive Director

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

ABC of NC served 14 children in the intensive early intervention program and offered, on average, 4 autism-specific parent/caregiver classes each month (Jan=4; Feb=4; Mar=4). We also provided quarterly team meetings, home visits, or virtual visits for parents/caregivers.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We anticipate that we will meet the expectations outlined in our Deliverables/Outputs and our Expected Outcomes. Final assessments will be completed during the 4th quarter for final reporting on all objectives and measures.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment. All students are making progress towards their goals. Parents will complete the satisfaction survey at the conclusion of the school year (June, 2024).

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 91,526.75	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 2,964.65	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 747.97	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 2,678.71	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 672.01	\$
Other Expenses (Specify): insurance, medical testing, background checks	\$ 1,409.91	\$
Total Expenses:	\$ 100,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	300,000.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 274,580.27	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 6,681.47	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 3,516.22	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 5,749.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 5,639.68	\$
Other Expenses (Specify): insurance, medical testing, background checks	\$ 3,833.36	\$
Total Expenses:	\$ 300,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ABC of NC Child Development Center
Recipient Tax ID #	30-0111894
Project/Activity Title:	Autism Early Intervention Model Program
Reporting Period (Quarter):	4
Report Completion Date:	07/10/2024
Preparer of This Report:	Selene Johnson, Executive Director

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

ABC of NC served 14 children in the intensive early intervention program and offered, on average, 3.7 autism-specific parent/caregiver classes each month (Apr=4; May=4; Jun=3). We also provided quarterly team meetings, home visits, or virtual visits for parents/caregivers. ABC of NC served a total of 16 children in the program during the entirety of the 2023-24 school year. Quarterly team meetings, home visits, or virtual visits/meetings were made available to all clients enrolled in the early intervention program.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Five parents/caregivers responded to a confidential survey created through SurveyMonkey in June, 2024.

Data from these surveys are as follows:

*80% of parent/caregiver survey respondents reported "significant improvement" in communication skills and social interaction/friendships. 100% of respondents reported some improvement in those areas.

*60% of parent/caregiver survey respondents reported "moderate" or "significant" improvement in diet/feeding issues.

*100% of parent/caregiver survey respondents reported improvement in toileting and self-help/independence.

*100% of parent/caregiver survey respondents reported improvement in managing parent/caregiver stress and relationships among siblings and between caregivers.

*100% of parent/caregiver survey respondents reported improved confidence in being an advocate for their child.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Service Quality Measure: Each year, the contractor will document in the last quarterly report to the Division early intervention program parents/caregivers reporting 85% satisfaction with the program through surveys and/or other information-gathering methods through the contract year.

Outcome: Five parents/caregivers responded to a confidential survey created through SurveyMonkey in June, 2024.

MET: Out of all respondents, 100% reported that they would be “very likely” to use ABC of NC’s services again when given choices of: very likely, likely, somewhat likely, or not at all likely.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

All students enrolled in the early intervention program had individualized education plans (IEPs) developed within the first 30 days of enrollment. IEP goals were developed from results of assessments, including the PICS, VB-MAPP, and Structured Play Assessment.

1) Each year, 75% of early intervention program students will make progress on at least 60% of all initial IEP goals. MET: 100% of early intervention program students made progress on at least 60% of all initial IEP goals.

2) Each year, 75% of early intervention program students will demonstrate improvement on at least one (1) measure of the Pictorial Infant Communication Scales (PICS). MET: 92% of students demonstrated improvement on at least one (1) measure of the Pictorial Infant Communication Scales (PICS) AND/OR reached maximum score.

3) Each year, 75% of early intervention program students will demonstrate improvement on at least five (5) measures of the Verbal Behavior Milestones Assessment and Placement Program (VB-MAPP). MET: 100% of students demonstrated improvement on at least five (5) measures of the Verbal Behavior Milestones Assessment and Placement Program (VB-MAPP) AND/OR reached maximum score.

4) Each year, 75% of early intervention program students will demonstrate improvement on at least one (1) level on the Structured Play Assessment or will reach the maximum score on each assessment. MET: 100% of early intervention program students demonstrated improvement on at least one (1) level on the Structured Play Assessment AND/OR reached the maximum score.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	100,000.00	0.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 91,526.73	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 2,737.53	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,270.78	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,486.32	\$
Other Expenses (Specify): insurance, medical testing, background checks	\$ 2,978.64	\$
Total Expenses:	\$ 100,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 366,107.00	\$ 0.00
Supplies and Materials Expenses (e.g., office supplies):	\$ 9,419.00	\$ 0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,787.00	\$ 0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$ 0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 5,749.00	\$ 0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 7,126.00	\$ 0.00
Other Expenses (Specify): insurance, medical testing, background checks	\$ 6,812.00	\$ 0.00
Total Expenses:	\$ 400,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ALSNC
Recipient Tax ID #	56-1609591
Project/Activity Title:	Care Services Delivery to the ALS Population in Every North Carolina County
Reporting Period (Quarter):	FYE: 2024 Q1
Report Completion Date:	
Preparer of This Report:	Holly Zahn

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

These are outlined in the Performance Measures.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

We continue to serve the ALS community here in North Carolina. Details are outlined in the Performance Measures.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Our annual survey will be initiated in Spring of 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. We will track and report the number of persons with ALS (pALS) served across North Carolina (NC) per quarter.
2. Our staff members are present or provide follow-up support for the 15-17 ALS clinic days scheduled across the state of NC each month. Staff offer both new and established patients & families, as well as clinic team members, information on our programs and services, education, emotional support, and act as a bridge between the clinic setting and the community. The Organization will report on the numbers seen at each clinic:
 - a. Number of new pALS
 - b. Number of returning pALS
3. We will facilitate Virtual Support Groups which are accessible to persons with ALS and their support system throughout the state of North Carolina. The Organization will note if:
 - a. Less than 15 connection groups are held each quarter
 - b. Report on the number of groups offered that quarter
4. We will maintain a financial assistance grant available to each ALS patient in NC to reimburse for ALS-related expenses that are not covered by insurance, Medicare or Medicaid. The Organization will report on the number of grants approved biannually.
5. We will maintain 4 Equipment Loan Program locations across North Carolina for durable medical equipment and report on number of families utilizing the Loan Program. The Organization will report on:
 - a. The number of equipment requests each quarter
 - b. The number of families utilizing this program
6. We will report on the number of families served by the bereavement program.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$78,438.31	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$19,236.45	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$97,674.76	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$78,438.31	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$19,236.45	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$97,674.76	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ALSNC
Recipient Tax ID #	56-1609591
Project/Activity Title:	Care Services Delivery to the ALS Population in Every North Carolina County
Reporting Period (Quarter):	FYE: 2024 Q2
Report Completion Date:	6/20/2024
Preparer of This Report:	Holly Zahn

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

These are outlined in the Performance Measures.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

We continue to serve the ALS community here in North Carolina. Details are outlined in the Performance Measures.

**3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s).
Have you accomplished any of your expected results?**

Our annual survey will be initiated in Spring of 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. We will track and report the number of persons with ALS (pALS) served across North Carolina (NC) per quarter. 571
2. Our staff members are present or provide follow-up support for the 15-17 ALS clinic days scheduled across the state of NC each month. Staff offer both new and established patients & families, as well as clinic team members, information on our programs and services, education, emotional support, and act as a bridge between the clinic setting and the community. The Organization will report on the numbers seen at each clinic:
 - a. Number of new pALS: 79
 - b. Number of returning pALS: 275
3. We will facilitate Virtual Support Groups which are accessible to persons with ALS and their support system throughout the state of North Carolina. The Organization will note if:
 - a. Less than 15 connection groups are held each quarter: NA
 - b. Report on the number of groups offered that quarter: 25
4. We will maintain a financial assistance grant available to each ALS patient in NC to reimburse for ALS-related expenses that are not covered by insurance, Medicare or Medicaid. The Organization will report on the number of grants approved biannually.

Our second period 2023 grant resulted in 176 grants paid to people in NC.

5. We will maintain 4 Equipment Loan Program locations across North Carolina for durable medical equipment and report on number of families utilizing the Loan Program. The Organization will report on:
 - a. The number of equipment requests each quarter: 76
 - b. The number of families utilizing this program: Our new database system was not able to determine this number accurately and have since come up with a solution to will be able to accurately report this number beginning with the quarter including: 1/1/2024 to 3/31/2024.
6. We will report on the number of families served by the bereavement program. 200

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$75,763.55	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$19,236.45	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$95,000.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$151,527.10	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$38,472.90	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$190,000.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ALSNC
Recipient Tax ID #	56-1609591
Project/Activity Title:	Care Services Delivery to the ALS Population in Every North Carolina County
Reporting Period (Quarter):	FYE: 2024 Q3
Report Completion Date:	6/20/2024
Preparer of This Report:	Holly Zahn

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

These are outlined in the Performance Measures.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

We continue to serve the ALS community here in North Carolina. Details are outlined in the Performance Measures.

**3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s).
Have you accomplished any of your expected results?**

Our annual survey will be initiated in Spring of 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. We will track and report the number of persons with ALS (pALS) served across North Carolina (NC) per quarter. 544
2. Our staff members are present or provide follow-up support for the 15-17 ALS clinic days scheduled across the state of NC each month. Staff offer both new and established patients & families, as well as clinic team members, information on our programs and services, education, emotional support, and act as a bridge between the clinic setting and the community. The Organization will report on the numbers seen at each clinic:
 - a. Number of new pALS: 47
 - b. Number of returning pALS: 278
3. We will facilitate Virtual Support Groups which are accessible to persons with ALS and their support system throughout the state of North Carolina. The Organization will note if:
 - a. Less than 15 connection groups are held each quarter: NA
 - b. Report on the number of groups offered that quarter: 25
4. We will maintain a financial assistance grant available to each ALS patient in NC to reimburse for ALS-related expenses that are not covered by insurance, Medicare or Medicaid. The Organization will report on the number of grants approved biannually.

Our first period 2024 grant is still open.

5. We will maintain 4 Equipment Loan Program locations across North Carolina for durable medical equipment and report on number of families utilizing the Loan Program. The Organization will report on:
 - a. The number of equipment requests each quarter: 102
 - b. The number of families utilizing this program: 275
6. We will report on the number of families served by the bereavement program. 210

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$75,711.77	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$19,288.83	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$95,000.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$227238.28	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$57,761.73	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$285,000.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	ALSNC
Recipient Tax ID #	56-1609591
Project/Activity Title:	Care Services Delivery to the ALS Population in Every North Carolina County
Reporting Period (Quarter):	FYE: 2024 Q4
Report Completion Date:	6/20/2024
Preparer of This Report:	Holly Zahn

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

These are outlined in the Performance Measures.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

We continue to serve the ALS community here in North Carolina. Details are outlined in the Performance Measures.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We received 81 returned surveys with an average satisfaction of 97.53%.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. We will track and report the number of persons with ALS (pALS) served across North Carolina (NC) per quarter. 518
2. Our staff members are present or provide follow-up support for the 15-17 ALS clinic days scheduled across the state of NC each month. Staff offer both new and established patients & families, as well as clinic team members, information on our programs and services, education, emotional support, and act as a bridge between the clinic setting and the community. The Organization will report on the numbers seen at each clinic:
 - a. Number of new pALS: 98
 - b. Number of returning pALS: 411
3. We will facilitate Virtual Support Groups which are accessible to persons with ALS and their support system throughout the state of North Carolina. The Organization will note if:
 - a. Less than 15 connection groups are held each quarter: NA
 - b. Report on the number of groups offered that quarter: 26
4. We will maintain a financial assistance grant available to each ALS patient in NC to reimburse for ALS-related expenses that are not covered by insurance, Medicare or Medicaid. The Organization will report on the number of grants approved biannually.

Our first period 2024 grants yielded paying 197 grants in the amount of \$124,778 to people with ALS living in NC.

5. We will maintain 4 Equipment Loan Program locations across North Carolina for durable medical equipment and report on number of families utilizing the Loan Program. The Organization will report on:
 - a. The number of equipment requests each quarter: 88
 - b. The number of families utilizing this program: 282
6. We will report on the number of families served by the bereavement program. 204

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$75,684.97	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$19,315.03	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$95,000.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$302,923.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$77,076.75	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$380,000.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	The Arc of North Carolina
Recipient Tax ID #	56-0753097
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	7/1/2023 - 9/30/2024 & 10/1/2023 - 12/31/2023
Report Completion Date:	
Preparer of This Report:	Sheila Sapp

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Arc of NC has regrouped our self-direction team. We have completely updated training materials that includes the MCO's materials for our team and are accessible on-line. Discussions are being held to expand training opportunities in the Eastern and Western part of the state. We have families that are working together, discussing issues, ideas and concerns. Working with families to address Appendix K Flexibilities ending 2/29/2024 and what to expect after that. The Arc is also learning more about the new FSSA agency in our state – have held meetings with their leadership team and also have participated in meetings with EOR's who have met with the new FSSA agency. The Arc of NC is starting to see a few more referrals.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The Arc of NC is in the process of setting up a webinar for EOR's to discuss topics for the micro-trainings for this target group. Currently we have 3 EOR's who are strong advocates for this program and The Arc continues to partner and connect EOR's to utilize these mentors. This is turning out to be a wonderful experience for all.

The Arc of North Carolina has been talking with one MCO regarding training and Community Guide Services to assist families once they begin to self-direct their services.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The Arc of NC is finalizing a new training strategy using each of the MCO's self-direction materials that are on their website. A training check sheet has been developed as well. A PowerPoint Presentation has been created to share with families to provide a brief overview about self-direction and the process for this program.

The Arc of NC will be doing training with our TCM team in self-direction so that the team can be educated on self-direction and feel comfortable explaining self-direction as well as knowing who can be contacted if more information is needed. There are a lot of moving parts across the state right now and The Arc is wanting to partner with others across the state to develop a deeper understanding of self-direction.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The Arc of NC will identify, train and support 3-4 staff members of The Arc, each contract year to become trainers to provide one-on-one and group trainings on AWC and EOR: 1. The Arc of NC currently has 4 staff that are doing the training – with 1 back up staff if needed at this time. We are putting a plan together to expand those numbers across the state.
2. The Arc of NC will develop advanced training materials on 3-4 topics, per contract year for people already utilizing AWC or EOR to self-direct their services: The Arc of NC will be meeting with current EOR's to identify the training materials that are of interest.
3. These advanced training materials will be utilized to facilitate 3-4 micro-trainings/discussions for 5-6 individuals and families, during each contract year, who are already utilizing the AWC and EOR models to self-direct their services: The Arc of NC will hold micro-trainings/discussions for individuals and families. These training materials will be discussed and identified in the 3rd quarter.
4. AWC and EOR training materials will be utilized to provide introductory training for 15 additional Supports Managers, Resource Advocates/Extenders and Care Managers, during each contract year on self-direction and how to empower the people they support to take a more active role in directing their own services: The Arc of NC will work with our TCM team in each Region to provide introductory training to Care Managers and Extenders across the state.
5. The Arc of NC will develop 2 short videos featuring individuals with IDD and/or their family members who are self-directing their services: The Arc of NC is working to determine the 2 short video's featuring individuals with IDD and/or their family members who are self-directing their services.
6. The Arc of NC will partner with the Beyond Academics Program at the University of North Carolina Greensboro to provide students more education about self-direction: The Arc of NC will be contacting the program at UNCG – Beyond Academics during the 3rd quarter of this grant year.
7. The Arc of NC will identify, train, and support 2-4 "peer mentors" who are already self-directing services for themselves or a family member: The Arc of NC will work in the 3rd quarter to identify "peer mentors" who are already self-directing services.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 22,117.71	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 258.50	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 250.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,250.00	\$
Other Expenses (Specify):	\$ 258.00	\$
Total Expenses:	\$ 24,134.21	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 22,117.71	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 258.50	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 250.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,250.00	\$
Other Expenses (Specify):	\$ 258.00	\$
Total Expenses:	\$ 24,134.21	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	The Arc of North Carolina
Recipient Tax ID #	56-0753097
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	1/1/2024 - 3/31/2024
Report Completion Date:	
Preparer of This Report:	Sheila Sapp

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this quarter, The Arc held 2 Lunch and Learn meetings with EOR families, had a training session regarding self direction with 6 staff, met with the representative at UNCG - Beyond Academics program. Spent time meeting with families to again the ending of Appendix K along with RADSE information. Have talked with a couple of families regarding the idea for 2 videos.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

During this reporting period we have connected 2 new EOR families and 1 family that is still gathering information and knowledge to peer mentors. Training to Care Managers took place and will be scheduling training for Extenders as well. Staff are have provided ?? "interest training" to families - educating families on the difference between Provider Directed Services, Agency with Choice and Employer of Record. During this quarter there were ??? families that have stated EOR training.

One informational Lunch and Learn was held with the new FSSA agency. The meeting was well attended and very informative for all. Talked with EOR's and asked about topics for micro trainings and those attended expressed that they would like the Audit Tool to be reviewed and discussed. This will take place in the last quarter.

The Arc is being contacted by several MCO, asking about educating families interested and we are working with the MCO and families to address this.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Met with six Care Managers provided training using the PowerPoint Presentation to help educate about self-direction and how to approach during a team meeting for those having the innovations waiver. The process for a family to begin self-direction was shared as well.

The Arc has facilitated two lunch and learn webinars and we have had current EOR's attend along with 2 families that are interested and wanted to learn more. A Care Manager from one of the MCO's also attended.

Two EOR's have been identified to assist with developing the 2 videos for the grant.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The Arc of NC will identify, train and support 3-4 staff members of The Arc, each contract year to become trainers to provide one-on-one and group trainings on AWC and EOR: The Arc of NC currently has 4 staff that are doing the trainings along with 1 back up staff if needed. There is a meeting being held during the month of April to discuss how to expand.
2. The Arc of NC will develop advanced training materials on 3-4 topics, per contract year for people already utilizing AWC or EOR to self-direct their services: The Arc met with EOR Families the beginning of February to discuss. One of the most important thing was talking about peer mentors and what that means and how this can be helpful, The Arc assisted in getting people connected and discussing what a peer mentor can do. Appendix K Flexibilities, The Arc provided information and a very in depth conversation regarding this. Other topics of interest include training on the following: Audit Tool, Budget Changes and Rates and plans. The Arc will schedule trainings to discuss all.
3. These advanced training materials will be utilized to facilitate 3-4 micro-trainings/discussions for 5-6 individuals and families, during each contract year, who are already utilizing the AWC and EOR models to self-direct their service: The Arc held 2 Lunch and Learn webinars this quarter - the first one was to bring as many EOR's to the table to introduce families and have an open discussion about the program. We have experienced EOR, new EOR and a couple who are interested in self-direction. This discussions went well - great participation and connections were made and experienced EOR's shared their contact information and offered to talk with others as needed. The Second Lunch and Learn, we invited the new FSSA agency, this was a great meeting as well - the information shared brought a lot of discussions to the meeting.
4. AWC and EOR training materials will be utilized to provide introductory training for 15 additional Supports Managers, Resource Advocates/Extenders and Care Managers, during each contract year on self-direction and how to empower the people they support to take a more active role in directing their own services: The Arc provided training to 6 Care Managers this quarter.
5. The Arc of NC will develop 2 short videos featuring individuals with IDD and/or their family members who are self-directing their services: The Arc has identified an EOR to help with the development of one of the videos for the grant. A meeting is scheduled in April to start the process and have the video completed by 6/30/2024.
6. The Arc of NC will partner with the Beyond Academics Program at the University of North Carolina Greensboro to provide students more education about self-direction: Met with the Director, Integrative Community Studies (Beyond Academics) in March and the discussion was started on how to provide students more education about self-direction. This is something that will be addressed in the fall, due to the student schedules.
7. The Arc of NC will identify, train, and support 2-4 "peer mentors" who are already self-directing services for themselves or a family member: I am pleased to report that this has happened. We have 3 EOR's who are peer mentors and doing a great job.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 11,058.93	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 0.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 1,875.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,291.66	\$
Other Expenses (Specify): Conference	\$ 550.00	\$
Total Expenses:	\$ 17,775.59	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 33,176.64	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 258.50	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 2,125.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 5,541.66	\$
Other Expenses (Specify): Conference	\$ 808.00	\$
Total Expenses:	\$ 41,909.80	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	The Arc of North Carolina
Recipient Tax ID #	56-0753097
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	4/1/2024 - 6/30/2024
Report Completion Date:	7/18/2024
Preparer of This Report:	Sheila Sapp

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During the 4th quarter of the grant, The Arc held 2 Lunch & Learns with families, provided a training for extenders, connected 4 families to a peer mentor, completed 2 videos for this year which are posted on The Arc of NC website. Our team has attended meetings with one of the FSSA's, and we have attended EOR Stakeholder Meeting with 2 MCO's. The Arc has assisted 10 families with Self-Direction Training for this grant period to become an EOR - with a total of 56 individuals/families that are active EOR's, and there is a waiting list. To date, The Arc is providing AWC services to 15 families

The Arc is talking with one MCO about working with families that are currently CAP-C and will be transitioning to innovations waiver services. The MCO would like The Arc to educate/train these individuals/families so there will not be a gap in services when the transition occurs. There is a meeting that will take place in July to start this.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

During this reporting period we connected 4 additional families with a peer mentor. One of our Lunch and Learn was a Q&A session - one person attending is trying to make a decision about self-direction and appreciated the connection with a peer mentor.

Staff have attended stakeholder meetings, we have met with Care Coordinators/Care Managers with MCO's to help explain processes: how to incorporate self-direction into an ISP, how to incorporate the FSSA in the plan, units, employer supplies etc. and we have had to redirect Care Coordinators/Care Managers back to their supervisors to verify things.

There continues to be a lot of moving pieces - with this grant we will continue to work and educate staff, work with LME/MCO's and other providers regarding Self-Direction,

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The Arc self-direction team will continue to educate and support our TCM team or any other TCM provider regarding Self-Direction. The Arc will continue to educate Care Coordinators as well. During this grant year, one of our Care Managers with TCM is working one family that is self-directing their services.

The Arc facilitated 2 Lunch and Learns webinars - One to discuss and review the audit tool and then another was a Q&A session. Both of the sessions were recommendations for EOR's and interested individuals.

Connecting more families to a peer mentor is rewarding. Providing families a person to talk to about this process is beneficial for the peer mentor and the family.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The Arc of NC will identify, train and support 3-4 staff members of The Arc, each contract year to become trainers to provide one-on-one and group trainings on AWC and EOR: The Arc of North Carolina met this Performance Measure for this grant year – 4 staff and one back up staff.
2. The Arc of NC will develop advanced training materials on 3-4 topics, per contract year for people already utilizing AWC or EOR to self-direct their services: The Arc of North Carolina met this performance Measure for this grant year. This goal was met. The Arc met with EOR Families to discuss topics of interests. During this grant year, The Arc was able to identify 3 peer mentors and connected 6 EOR's families and 2 families that are interested in EOR to peer mentors. Topics that were discussed during our Lunch and Learns included: Appendix K Flexibilities, Learn more about Self-Direction, FSSA introduction and brief presentation, Audit Tool, Budget Changes and Rates and plans, and a Q&A.
3. These advanced training materials will be utilized to facilitate 3-4 micro-trainings/discussions for 5-6 individuals and families, during each contract year, who are already utilizing the AWC and EOR models to self-direct their service: The Arc of North Carolina met this Performance Measure for this grant year. This quarter, The Arc held 2 Lunch and Learn webinars this quarter – the Audit tool was reviewed along with discussions about budget changes and rates. The Second Lunch and Learn was a Q&A session, we had EOR families and a family that is considering doing EOR. The participation and discussion during this time was amazing. So much group interaction and we had a peer mentor attending and other EOR families jumped and shared their experience.
4. AWC and EOR training materials will be utilized to provide introductory training for 15 additional Supports Managers, Resource Advocates/Extenders and Care Managers, during each contract year on self-direction and how to empower the people they support to take a more active role in directing their own services: This performance measure was met for this grant year. Training materials were utilized with 6 Support Managers and 3 Care Managers this quarter, but we had 6 other staff in the previous quarter for a total of 15. Staff held meetings with Care Coordinators with MCO's to help explain processes and we have had to redirect Care Coordinators back to their supervisors to verify things. Staff have also held meetings to educate and work with Care Coordinators with Appendix K flexibilities for AWC families that were working as RADSE.
5. The Arc of NC will develop 2 short videos featuring individuals with IDD and/or their family members who are self-directing their services: Two videos were completed in June of 2024. The Arc was pleased to work with one of our EOR families to produce a video discussing Peer Mentorship and the other video is this EOR's story.
6. The Arc of NC will partner with the Beyond Academics Program at the University of North Carolina Greensboro to provide students more education about self-direction: Met with the Director, Integrative Community Studies (Beyond Academics) in March and the discussion was started on how to provide students more education about self-direction. This is something that will be addressed in the fall, due to the student schedules.
7. The Arc of NC will identify, train, and support 2-4 "peer mentors" who are already self-directing services for themselves or a family member: I am pleased to report that this has happened. We have 3 EOR's who are peer mentors and doing a great job. One of the video's that was produced in June features one of the Peer Mentor that is there to assist and talk with EOR's and has even had conversations with families considering self-direction.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	66,155.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 15,861.36	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 200.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 658.50	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 975.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,458.34	\$
Other Expenses (Specify):	\$ 5,092.00	\$
Total Expenses:	\$ 24,245.20	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 49,038.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 200.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 917.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 3,100.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 7,000.00	\$
Other Expenses (Specify):	\$ 5,900.00	\$
Total Expenses:	\$ 66,155.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Autism Society of North Carolina, Inc.
Recipient Tax ID #	23-7087887
Project/Activity Title:	
Reporting Period (Quarter):	1
Report Completion Date:	1/26/2024
Preparer of This Report:	Paul M. Wendler ; Kerri Erb

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Yearly goal: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q1 results:
 • Number of calls/encounters: 2009
 • Number of crisis calls/encounters: 94
 • Number of in-person meetings: 93
 • Note that most meetings are now being held by phone or video conference, not in-person.
 • Number of non-English speaking calls/encounters: 142
 • Number of newly diagnosed newly diagnosed families referred to ASNC by diagnostic centers and outside agencies: 80
 • Outcomes of these calls/encounters:
 Of these calls/encounters, 95% will get at least one of the following immediate outcomes: attempted to contact, provided active/supportive listening, provided problem solving, provided information, provided referral and connection to resources, met with or attended meeting with individual.
 100% of encounters received at least one immediate outcome.
 Outcome percentages – note that percentages add up to more than 100% because individuals may receive more than one outcome per encounter.
 • Attempted to contact - 335, 17%
 • Made calls to other agencies on behalf of - 91, 5%
 • Provided active/supportive listening - 1498, 75%
 • Met with individual - 1566, 78%
 • Provided information - 1220, 61%
 • Provided referral and connection to resources - 1180, 59%
 • Of the routine calls/encounters, 8% will get routine follow up
 Quarterly follow-up across all routine calls: 15%
 • Of the crisis calls, 95% of those crisis calls/encounters will receive follow up

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Please see above, yes, ongoing work to support our objectives all year.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Please see above, yes, ongoing work to support our objectives all year.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Please see above, yes, ongoing work to support our objectives all year.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	358,608.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,347.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 5,790.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,868.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,179.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 91,184.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,347.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 5,790.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,868.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,179.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 91,184.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Autism Society of North Carolina, Inc.
Recipient Tax ID #	23-7087887
Project/Activity Title:	
Reporting Period (Quarter):	2
Report Completion Date:	1/26/2024
Preparer of This Report:	Paul M. Wendler ; Kerri Erb

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Q4 Parent to Parent Support
 Year-to-Date: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q2 report

• Number of calls/encounters: 1920

• Number of crisis calls/encounters: 86

• Number of in-person meetings: 133

o Note that meetings are held by phone or video conference, and in-person.

• Number of non-English speaking calls/encounters: 161

• Number of newly diagnosed newly diagnosed families referred to ASNC by diagnostic centers and outside agencies 190:

o 99% of these calls/encounters:

o Of these calls/encounters, 95% will get at least one of the following immediate outcomes: attempted to contact, provided active/supportive listening, provided problem solving, provided information, provided referral and connection to resources, met with or attended meeting with individual.

100% of encounters received at least one immediate outcome.

Outcome percentages – note that percentages add up to more than 100% because individuals may receive more than one outcome per encounter.

• Attempted to contact - 348, 17%

• Made calls to other agencies on behalf of - 76, 4%

• Provided active/supportive listening - 1487, 77%

• Provided problem solving - 1570, 82%

• Provided information - 1222, 64%

• Provided referral and connection to resources - 1131, 59%

• Of the routine calls/encounters, 8% will get routine follow up

Quarterly follow-up across all routine calls: 14%

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Please see above, ongoing progress is being made.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Please see above - ongoing results throughout the year.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Please see above.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u> <u>SFY 2023-2024</u>	<u>Amount of Expenditure</u> <u>SFY 2024-2025</u>
	<i>Amount of Appropriation</i> 358,608.00	358,608.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,347.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,621.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,868.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,179.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 90,015.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 150,694.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 10,411.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 17,736.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,358.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 181,199.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Autism Society of North Carolina, Inc.
Recipient Tax ID #	23-7087887
Project/Activity Title:	47045
Reporting Period (Quarter):	3
Report Completion Date:	12/4/24 (submitted on incorrect form for 4/15/24)
Preparer of This Report:	Paul M. Wendler; Edgar Moreno, Kerri Erb

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Q3: Parent to Parent Support

Yearly goal: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q3 report -

Number of calls/encounters: 2052

Number of crisis calls/encounters: 78

Number of in-person meetings: 98

Note that most meetings are now being held by phone or video conference, not in-person.

Number of non-English speaking calls/encounters: 161

Number of newly diagnosed newly diagnosed families referred to ASNC by diagnostic centers and outside agencies: 124

Outcomes of these calls/encounters:

Of these calls/encounters, 95% will get at least one of the following immediate outcomes: attempted to contact, provided active/supportive listening, provided problem solving, provided information, provided referral and connection to resources, met with or attended meeting with individual.

100% of encounters received at least one immediate outcome.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Yes, several met, see above for details.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Yes, making progress as anticipated and deliverables are on schedule. See Section 1 for full details.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Q3: Parent to Parent Support

Yearly goal: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q3 report -

Number of calls/encounters: 2052

Number of crisis calls/encounters: 78

Number of in-person meetings: 98

Note that most meetings are now being held by phone or video conference, not in-person.

Number of non-English speaking calls/encounters: 161

Number of newly diagnosed newly diagnosed families referred to ASNC by diagnostic centers and outside agencies: 124

Outcomes of these calls/encounters:

Of these calls/encounters, 95% will get at least one of the following immediate outcomes: attempted to contact, provided active/supportive listening, provided problem solving, provided information, provided referral and connection to resources, met with or attended meeting with individual.

100% of encounters received at least one immediate outcome.

Outcome percentages – note that percentages add up to more than 100% because individuals may receive more than one outcome per encounter.

Attempted to contact - 366, 18%

Made calls to other agencies on behalf of - 65, 3%

Provided active/supportive listening – 1541, 75%

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	358,608.00	358,608.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,347.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 3,310.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,868.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,179.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 88,704.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 226,041.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 13,721.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 26,604.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 3,537.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 269,903.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Autism Society of North Carolina, Inc.
Recipient Tax ID #	23-7087887
Project/Activity Title:	47045
Reporting Period (Quarter):	4
Report Completion Date:	12/4/24 (submitted on incorrect form for 7/15/24)
Preparer of This Report:	Paul M. Wendler; Edgar Moreno, Kerri Erb

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Q4: Parent to Parent Support

Yearly goal: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q4/Annual report -

Number of calls/encounters:

Q4: 2161

Annual: 8142

Number of crisis calls/encounters:

Q4: 71

Annual: 329

Number of in-person meetings:

Q4: 105

Annual: 430

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Yes, see above for details.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Yes, outcomes and deliverables are complete. See Section 1 for full details.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Q4: Parent to Parent Support

Yearly goal: An estimated 5,000 individuals will receive support by phone, through email, via video conferencing, via letter, and at in person meetings.

Q4/Annual report -

Number of calls/encounters:

Q4: 2161

Annual: 8142

Number of crisis calls/encounters:

Q4: 71

Annual: 329

Number of in-person meetings:

Q4: 105

Annual: 430

Note that most meetings are now being held by phone or video conference, not in-person.

Number of non-English speaking calls/encounters:

Q4: 122

Annual: 586

Number of newly diagnosed newly diagnosed families referred to ASNC by diagnostic centers and outside agencies:

Q4: 145 / Annual: 481

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	358,608.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,347.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 3,311.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,868.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 1,179.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 88,705.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 301,388.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 0.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 17,032.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 35,472.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,716.00	\$
Other Expenses (Specify):	\$ 0.00	\$
Total Expenses:	\$ 358,608.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Boys Club of Wake County, Inc. d/b/a Boys & Girls Clubs
Recipient Tax ID #	56-0863051
Project/Activity Title:	Boys & Girls Clubs Directed Grant
Reporting Period (Quarter):	July 1-December 31, 2023
Report Completion Date:	January 18, 2024
Preparer of This Report:	Heather Brosz White

Were grant funds expended during this reporting period? Yes No (Funds have been spent, but state grant funds have not yet been received)

Do you certify that all expenses to date have been submitted for this grant? Yes No (I have not yet received all expense reports for the period July-December from subgrantees, and grant funds have not yet been received)

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No (Grant funds have not yet been received)

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Through December 31, we had 12,400 youth involved in Power Hour, our academic support programming. We had 720 participants in SMART Moves program, 193 participants in Street SMART, and 394 participants in Healthy Habits across the state.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Objectives have not yet been met through December 31, although progress has been made. Boys & Girls Clubs organizations across the state are working to meet objectives in programming with Power Hour, SMART Moves, Street SMART, and Healthy Habits.

An additional objective is to partner with PAXIS Tools to provide training for Boys & Girls Clubs staff across the state. While we have continued to be in communication and done preparatory work, we have not yet received state grant funds and so this project is temporarily on hold.

An additional objective is to partner with Edmentum to provide academic assessments and tailored educational paths for youth. While we have continued to be in communication and done preparatory work, we have not yet received state grant funds and so this project awaiting a full launch.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Expected results have not yet been met through December 31. Programming is ongoing at this time. Boys & Girls Clubs organizations across the state are working to meet objectives and deliver results.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Through December 31, our outputs are essentially participation in nature, and those are noted above.

5. Provide a summary of expenditures during the reporting period (quarter).

Grant funds will be used primarily for personnel expenses and for training and for academic diagnostics and support.

No grant funds have been received to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$
Other Expenses (Specify):	\$
Total Expenses:	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$
Other Expenses (Specify):	\$
Total Expenses:	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Boys Club of Wake County, Inc. d/b/a Boys & Girls Clubs
Recipient Tax ID #	56-0863051
Project/Activity Title:	Boys & Girls Clubs Directed Grant
Reporting Period (Quarter):	January 1 - March 31, 2024
Report Completion Date:	April 15, 2024
Preparer of This Report:	Heather Brosz White

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Through March 31, we had 13,864 youth involved in Power Hour, our academic support programming. We had 7,542 participants in SMART Moves program, 1,695 participants in Street SMART, and 6,715 participants in Healthy Habits across the state. In all, 14,890 unduplicated participants have been reached through this grant.

We have had 39 full-time employees trained in PAX Tools through PAXIS, with additional trainings scheduled through the spring for full- and part-time Club staff.

Through our initiative with Edmentum's Exact Path, 226 students have taken math assessments and 138 have participated in their individualized learning pathway in math; 186 have taken reading assessments and 86 have participated in their individualized learning pathway in reading.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Objectives have not yet been met through March 31, although progress has been made. Boys & Girls Clubs organizations across the state are working to meet objectives in programming with Power Hour, SMART Moves, Street SMART, and Healthy Habits.

An additional objective is to partner with PAXIS to provide PAX Tools training for Boys & Girls Clubs staff across the state. We received state grant funds this quarter so this project kicked off in March with additional training dates planned and enrolling for the spring for full-time Club staff; part-time staff have online training available on demand through this grant.

An additional objective is to partner with Edmentum to provide academic assessments and tailored online educational paths for youth. This pilot initiative with the Exact Path platform began in February.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Expected results have not yet been met through March 31. Programming is ongoing at this time. Boys & Girls Clubs organizations across the state are working to meet objectives and deliver results.

Of the 138 students who have begun work on their Exact Path individualized learning path in math through March 31, they have mastered 148 math skills. Of the 86 students who have begun work on their Exact Path individualized learning path in reading through March 31, they have mastered 79 reading skills.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Through March 31, our outputs are essentially participation in nature, and those are noted above.

5. Provide a summary of expenditures during the reporting period (quarter).

Through March 31, grant funds have been used primarily for personnel expenses, and for academic diagnostics and programming. No grant funds were received until this quarter, so expenditures are skewed.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$1,951,646.81
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$49,500
Other Expenses (Specify):	\$
Total Expenses:	\$2,001,146.81

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

No funds were received until Q3 (January-March), so YTD and quarterly expenditures are the same.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$1,951,646.81
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$49,500
Other Expenses (Specify):	\$
Total Expenses:	\$2,001,146.81

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Boys Club of Wake County, Inc. d/b/a Boys & Girls Clubs
Recipient Tax ID #	56-0863051
Project/Activity Title:	Boys & Girls Clubs Directed Grant
Reporting Period (Quarter):	April 1 – June 30, 2024
Report Completion Date:	July 15, 2024
Preparer of This Report:	Heather Brosz White

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Through June 30, we had 15,249 youth involved in Power Hour, our academic support programming. We had 8,045 participants in SMART Moves program, 2,651 participants in Street SMART, and 6,946 participants in Healthy Habits across the state. In all, 17,334 unduplicated participants have been reached through this grant.

We have had 103 full-time and 19 part-time employees trained in PAX Tools through PAXIS, with additional trainings scheduled.

Through our initiative with Edmentum's Exact Path, 135 mastered at least one math skill and 447 total math skills were mastered; 82 mastered at least one reading skill and 266 total reading skills were mastered.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Many objectives have been met through June 30. Boys & Girls Clubs organizations across the state have provided programming utilizing Power Hour, SMART Moves, Street SMART, and Healthy Habits programs.

An additional objective was to partner with PAXIS to provide PAX Tools training for Boys & Girls Clubs staff across the state. Full- and part-time staff across the state have completed training with additional trainings scheduled.

An additional objective is to partner with Edmentum to provide academic assessments and tailored online educational paths for youth. Through June, 135 youth mastered at least one math skill, and a total of 447 math skills were mastered; 82 youth mastered at least one reading skill and a total of 266 reading skills were mastered.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Results are detailed below.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Through June, Boys & Girls Clubs across North Carolina served 17,334 unduplicated youth with at least one of the four grant-funded programs.

- Power Hour: 15,249 participants; report card analysis was conducted using 6,742 report cards
- SMART Moves: 8,045 participants; 4,637 completed the program and took the Reflective Survey
- Street SMART: 2,651 participants; 1,842 completed the program and took the Pre-/Post-Survey
- Healthy Habits: 6,946 participants; 3,583 completed the program and took the Retrospective Survey

Power Hour

The report card analysis compared fourth quarter grades with first quarter grades using 6,742 report cards. The analysis indicates 18% improved to grades of B and up, 40% maintained grades of B or better, 13% improved to C average, and 16% maintained a C average. Overall, 87% had at least a C average by the end of the school year. We also track Boys & Girls Club youth who drop out of school. Clubs reported 1 dropout in 2023-24.

We also participated in a pilot with Edmentum using their Exact Path software to provide academic assessments and tailored online educational paths for youth. Through June, in participating Club sites, 135 youth mastered at least one math skill, and a total of 447 math skills were mastered; 82 youth mastered at least one reading skill and a total of 266 reading skills were mastered.

SMART Moves

Boys & Girls Clubs had the option of leading SMART Moves: Emotional Wellness and/or SMART Moves: Core depending on the needs of their youth. 4,637 youth completed at least one of the SMART Moves curricula; 3,370 completed the Emotional Wellness module, and 1,392 completed the Core module.

After completing the Emotional Wellness curriculum:

- 41% indicated improvement in being able to stay calm when stressed
- 38% noted improvement in controlling their temper when they are upset
- 39% indicated improvement in knowing ways they could calm themselves down
- 38% noted improvement in understanding how their emotions affect others
- 35% expressed improvement in thinking before they act

After completing the Core curriculum:

- 27% expressed improvement in feeling confident in talking with adults about health questions
- 29% indicated improvement in thinking about how what they do today could affect their plans for the future
- 33% noted improvement in believing it is important to choose healthy behaviors
- 28% expressed improvement in taking the time List-Compare-Choose their options and consequences when making decisions about their health
- 28% indicated improvement in knowing which places online or in person provide truthful information

Street SMART

Street SMART is a program that focuses on four important topics to the intended age group of 10-14 year olds: maintaining positive relationships, handling conflict, standing up to bullying, and resisting gang involvement. 1,842 youth completed this program during the grant year and took the pre-/post-surveys. The surveys indicate that while most maintained similar responses from pre- to post-survey, sizeable portions increased their responses: 32% on friendships, 36% on conflict, 31% on bullying, and 28% on gangs.

Healthy Habits

Healthy Habits is a nutrition education program which 3,583 Club youth completed this grant year. While the majority indicated similar responses over time on the Retrospective Survey, significant portions reported growth:

- 35% indicated improved responses to "I choose to eat fruit or vegetables as a snack even when others around me are eating a sweet snack."
- 35% showed improvement to "I encourage others to make healthier food choices."
- 35% expressed improvement to "I am confident in my abilities to choose healthy foods."

Each year, Boys & Girls Clubs survey Club members to gather information on various topics. From the 2024 data from NC Boys & Girls Clubs, we know that:

- 92% expect to graduate from high school.
- 62% of 11th & 12th grade respondents "strongly agree" that they know what education or training they will need for the career they want. (Additionally, 33% Agreed.)
- 82% of Club teens stated an expectation of completing post-secondary education.
- 47% of 4th-12th grade respondents indicated a "very high" interest in STEM.
- 60% of respondents asserted it was "very true" that they get to explore new things at their Club.

- 69% of respondents affirmed it was “very true” that adults in their Club encourage me to be my best.
- 72% of respondents agreed it was “very true” that adults in their Club care about them.
- 87% of respondents affirmed it was “very true” that their Club has rules for how all are to be treated.
- 37% reported being physically active at least 60 minutes for 7 days per week (2021 NC Youth Risk Behavior Survey is 19% of NC teens in general)
- 96% of NC Club teens reported abstaining from alcohol (compared to 81% of NC teens, 2021 NC YRBS)
- 94% of NC Club teens reported abstaining from marijuana use (compared to 84% of NC teens, 2021 NC YRBS)

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$665,858.74
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$35,990.25
Other Expenses (Specify):	\$
Total Expenses:	\$701,848.99

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$2,617,505.55
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$85,490.25
Other Expenses (Specify):	\$
Total Expenses:	\$2,702,995.80

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Easter Seals UCP North Carolina & Virginia, Inc
Recipient Tax ID #	56-0670676
Project/Activity Title:	START
Reporting Period (Quarter):	Q1
Report Completion Date:	3/10/24
Preparer of This Report:	Brittney Peters-Barnes

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Significant increase in new individuals accessing the Resource Center in both planned and crisis capacity
- Community training linkages have expanded to include DSOHF and KidsPeace
- Continued community training with CIT departments in multiple counties to increase community capacity to safely support the individuals served

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- NC START Central is working with NC START West & East in collaboration with DSOHF in order to provide trainings spanning several months to providers throughout North Carolina
- The program has reestablished in person Community Education Team (CET) trainings with area MCOs to increase capacity and knowledge of care management providers
- Working to increase and maintain staffing in order to increase the census of individuals served

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Within Q1, 23 of the 145 individuals served experienced crisis events. Through crisis prevention activities and intervention support, individuals served experienced a decrease in emergency services and ED utilization. The most significant decreases occurred for children and transition age youth. Ongoing training throughout central NC, and the state at large continue to increase community capacity. NC START continues to receive ongoing requests throughout the region for training support.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. 80% or more of persons served will maintain their setting (current living environment) and avoid long-term hospitalization or a higher level of care. This decreases the strain on the broader system of care and improves outcomes for persons served.
23 individuals served made up 45 crisis contacts during Q1. Of those 23 individuals, 20 maintained their setting and 3 did not. Maintain setting also includes individuals who briefly went to the ED and were released back to their original home/setting. 86% of individuals who experienced crisis events maintained their setting.
2. Individuals served will experience at least a 20% reduction in emergency services usage compared to usage prior to receiving START services
This is an annual overall goal. Within the Q1 reporting period, 145 individuals received services within the Central region during this period.
 - Prior to receiving services, 40% of these individuals (59 people) experienced psychiatric hospitalization. Post involvement with START, 21% of those individuals (30 people) experienced hospitalization. This is an overall 49% reduction in psychiatric hospitalization.
 - Prior to receiving services, 53% of these individuals (77 people) experienced emergency department visits. Post involvement with START, 50% of these individuals (73 people) experience hospitalization. This is an overall 5% reduction in ED usage. This number is primarily attributed to adult consumers. Both child and transition age consumers experienced 19% and 29% decreases, respectively.
3. At least 10% of individuals served over the age of 18 will utilize the NC START Resource Center for planned and emergency supports
This is an overall annual goal. 13 individuals accessed the Resource Center in Q1. There were 71 eligible (over 18) individuals during this reporting period. This is 18% of eligible individuals accessing the Resource Center
4. Community outreach (defined as trainings that are not specific to one individual) will exceed 150 training hours per year for all planned services and supports for the purpose of improved capacity of the community systems to provide effective crisis prevention and intervention.
This is an overall annual goal. As of Q1, the START program has completed 37 hours of community training.
5. Waitlist for NC START will be decreased by 15% to increase access to services for adult recipients (15% or more of individuals on the waitlist will be activated for services or removed from the waitlist per year)
The program was not able to assign any individuals from the adult waitlist in Q1 due to staffing challenges.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 89,551.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 224.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,514.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 94,289.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 89,551.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 224.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,514.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 94,289.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Easter Seals UCP North Carolina & Virginia, Inc.
Recipient Tax ID #	56-0670676
Project/Activity Title:	START
Reporting Period (Quarter):	Q2
Report Completion Date:	3/11/24
Preparer of This Report:	Brittney Peters-Barnes

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Increase in new individuals accessing the Resource Center in both planned and crisis capacity
- Training linkage with DHHS's Child Behavioral Health (CBH) department, leadership presented at fall conference
- Continued community training with CIT departments in multiple counties to increase community capacity to safely support the individuals served

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The primary goal of START is to increase stability for individuals served. Within Q1, NC START was successful in supporting 15 individuals to inactive status for stability.

- NC START Central is working with NC START West & East in collaboration with DSOHF in order to provide trainings spanning several months to providers throughout North Carolina
- Developed training partnerships with UNC School of Social Work and the Arc of NC. This increases capacity for providers at multiple levels of the system of care
- As of this report, NC START Central is almost fully staffed for coordinators. The program will begin assigning individuals from the waitlist within Q3

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Within Q2, 20 of the 138 individuals served experienced crisis events. 90% of those individuals were able to maintain their placement. Through crisis prevention activities and intervention support, individuals served experienced a decrease in emergency services and ED utilization. The most significant decreases occurred for children and transition age youth. Ongoing training throughout central NC, and the state at large continue to increase community capacity. NC START continues to receive ongoing requests throughout the region for training support.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. 80% or more of persons served will maintain their setting (current living environment) and avoid long-term hospitalization or a higher level of care. This decreases the strain on the broader system of care and improves outcomes for persons served.
20 individuals served made up 45 crisis contacts during Q2. Of those 20 individuals, 18 maintained their setting and 2 did not. Maintain setting also includes individuals who briefly went to the ED and were released back to their original home/setting. 90% of individuals who experienced crisis events maintained their setting.
2. Individuals served will experience at least a 20% reduction in emergency services usage compared to usage prior to receiving START services
This is an annual overall goal. Within the Q1 reporting period, 138 individuals received services within the Central region during this period.
- Prior to receiving services, 41% of these individuals (57 people) experienced psychiatric hospitalization. Post involvement with START, 19% of those individuals (26 people) experienced hospitalization. This is an overall 54% reduction in psychiatric hospitalization.
- Prior to receiving services, 55% of these individuals (76 people) experienced emergency department visits. Post involvement with START, 51% of these individuals (70 people) experience hospitalization. This is an overall 8% reduction in ED usage. This number is primarily attributed to adult consumers. Both child and transition age consumers experienced 27% and 25% decreases, respectively.
3. At least 10% of individuals served over the age of 18 will utilize the NC START Resource Center for planned and emergency supports
This is an overall annual goal. 7 individuals accessed the Resource Center in Q1. There were 63 eligible (over 18) individuals during this reporting period. This is 11% of eligible individuals accessing the Resource Center
4. Community outreach (defined as trainings that are not specific to one individual) will exceed 150 training hours per year for all planned services and supports for the purpose of improved capacity of the community systems to provide effective crisis prevention and intervention.
This is an overall annual goal. Within Q2, the START program has completed 39 hours of community training. This is a total of 76 hours for this fiscal year.
5. Waitlist for NC START will be decreased by 15% to increase access to services for adult recipients (15% or more of individuals on the waitlist will be activated for services or removed from the waitlist per year)
The program was not able to assign any individuals from the adult waitlist in Q1 due to staffing challenges.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 79,494.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 289.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,149.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 83,932.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 169,045.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 513.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 8,663.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 178,221.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Easter Seals UCP North Carolina & Virginia, Inc.
Recipient Tax ID #	56-0670676
Project/Activity Title:	START
Reporting Period (Quarter):	Q3
Report Completion Date:	4/10/24
Preparer of This Report:	Brittney Peters-Barnes

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Continuing to increase new individuals accessing the Resource Center in both planned and crisis capacity
- Continued community training with CIT departments in multiple counties to increase community capacity to safely support the individuals served

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- NC START Central is continuing to work with NC START West & East in collaboration with DSOHF in order to provide trainings spanning several months to providers throughout North Carolina
- Developed training partnerships with UNC School of Social Work and the Arc of NC. This increases capacity for providers at multiple levels of the system of care
- As of this report, NC START Central continues to be fully staffed for coordinators. The program has hired a clinical specialist who is responsible for waitlist management and 6 individuals have been removed from the waitlist within Q3.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Within Q3, 17 of the 135 individuals served experienced crisis events. 88% of those individuals were able to maintain their placement. Through crisis prevention activities and intervention support, individuals served experienced a decrease in emergency services and ED utilization. Significant decreases occurred for children and transition age youth. Ongoing training throughout central NC, and the state at large continue to increase community capacity. NC START continues to receive ongoing requests throughout the region for training support.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. 80% or more of persons served will maintain their setting (current living environment) and avoid long-term hospitalization or a higher level of care. This decreases the strain on the broader system of care and improves outcomes for persons served.
17 individuals served made up 49 crisis contacts during Q3. Of those 17 individuals, 15 maintained their setting and 2 did not. Maintain setting also includes individuals who briefly went to the ED and were released back to their original home/setting. 88% of individuals who experienced crisis events during this quarter maintained their setting.
2. Individuals served will experience at least a 20% reduction in emergency services usage compared to usage prior to receiving START services
This is an annual overall goal. Within the Q3 reporting period, 135 individuals received services within the Central region during this period.
 - Prior to receiving services, 41% of these individuals (57 people) experienced psychiatric hospitalization. Post involvement with START, 20% of those individuals (24 people) experienced hospitalization. This is an overall 51% reduction in psychiatric hospitalization.
 - Prior to receiving services, 55% of these individuals (76 people) experienced emergency department visits. Post involvement with START, 42% of these individuals (58 people) experience hospitalization. This is an overall 23% reduction in ED usage. This number is impacted by adult consumers who have been involved with START for a longer term.
3. At least 10% of individuals served over the age of 18 will utilize the NC START Resource Center for planned and emergency supports
This is an overall annual goal. 11 individuals accessed the Resource Center in Q3. There were 62 eligible (over 18) individuals during this reporting period. This is 17% of eligible individuals accessing the Resource Center
4. Community outreach (defined as trainings that are not specific to one individual) will exceed 150 training hours per year for all planned services and supports for the purpose of improved capacity of the community systems to provide effective crisis prevention and intervention.
This is an overall annual goal. Within Q3, the START program has completed 44 hours of community training. This is a total of 114 hours for this fiscal year.
5. Waitlist for NC START will be decreased by 15% to increase access to services for adult recipients (15% or more of individuals on the waitlist will be activated for services or removed from the waitlist per year)
This is an overall annual goal. 6 individuals were removed from the waitlist in Q3.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 87,775.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 224.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 5,075.00	\$
Other Expenses (Specify): training	\$ 2,850.00	\$
Total Expenses:	\$ 95,924.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 256,820.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 738.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 13,737.00	\$
Other Expenses (Specify):	\$ 2,850.00	\$
Total Expenses:	\$ 274,145.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Easterseals PORT Health
Recipient Tax ID #	56-0670676
Project/Activity Title:	START
Reporting Period (Quarter):	Q4
Report Completion Date:	7/10/24
Preparer of This Report:	Brittney Peters-Barnes

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- The program hired a program specialist/waitlist manager who is responsible for connecting with individuals on the waitlist and assigning for services. The waitlist was decreased by 17% for this fiscal year.
- Continuing to increase new adult START recipients who are accessing the Resource Center
- Increase in community trainings throughout the region which has led to 151 hours of trainings in addition to the person-specific trainings completed by START coordinators.
- Individuals served who experience crises have decreased loss of placement. As of this report, 88% of individuals who experience crisis events have maintained their placement.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- NC START Central is continuing to work with NC START West & East in collaboration with DSOHF in order to provide trainings spanning several months to providers throughout North Carolina
- Developed training partnerships with UNC School of Social Work and the Arc of NC. This increases capacity for providers at multiple levels of the system of care
- As of this report, NC START Central continues to be fully staffed for coordinators. The program has hired a clinical specialist who is responsible for waitlist management and 38 individuals have been removed from the waitlist within Q4. This has contributed to an overall decrease in waitlist size by 17% for the fiscal year

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Within Q4, 25 of the 132 individuals served experienced crisis events. 88% of those individuals were able to maintain their placement. Through crisis prevention activities and intervention support, individuals served experienced a decrease in emergency services and ED utilization. Significant decreases occurred for children and transition age youth. Ongoing training throughout central NC, and the state at large continue to increase community capacity. Within this fiscal year, NC START Central provided 151 hours of community trainings which meets the stated goal for this year. This is in addition to the person-specific trainings completed for START recipients.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. 80% or more of persons served will maintain their setting (current living environment) and avoid long-term hospitalization or a higher level of care. This decreases the strain on the broader system of care and improves outcomes for persons served.
25 individuals served made up 31 crisis contacts during Q4. Of those 25 individuals, 22 maintained their setting and 3 did not. Maintain setting also includes individuals who briefly went to the ED and were released back to their original home/setting. 88% of individuals who experienced crisis events during this quarter maintained their setting.
2. Individuals served will experience at least a 20% reduction in emergency services usage compared to usage prior to receiving START services
This is an annual overall goal. Within the Q4 reporting period, 132 individuals received services within the Central region during this period.
- Prior to receiving services, 44% of these individuals (58 people) experienced psychiatric hospitalization. Post involvement with START, 18% of those individuals (23 people) experienced hospitalization. This is an overall 59% reduction in psychiatric hospitalization.
- Prior to receiving services, 52% of these individuals (68 people) experienced emergency department visits. Post involvement with START, 42% of these individuals (60 people) experience hospitalization. This is an overall 12% reduction in ED usage. This number is impacted by adult consumers who have been involved with START for a longer term. This number is also impacted by regional transfers of START recipients from the East and West teams who have moved to the Central region after significant crisis histories.
3. At least 10% of individuals served over the age of 18 will utilize the NC START Resource Center for planned and emergency supports
This is an overall annual goal. 13 individuals accessed the Resource Center in Q4. There were 66 eligible (over 18) individuals during this reporting period. This is 20% of eligible individuals accessing the Resource Center
4. Community outreach (defined as trainings that are not specific to one individual) will exceed 150 training hours per year for all planned services and supports for the purpose of improved capacity of the community systems to provide effective crisis prevention and intervention.
This is an overall annual goal. Within Q4, the START program has completed 44 hours of community training. This is a total of 151 hours for this fiscal year.
5. Waitlist for NC START will be decreased by 15% to increase access to services for adult recipients (15% or more of individuals on the waitlist will be activated for services or removed from the waitlist per year)
This is an overall annual goal.
Individuals removed from waitlist: Q1 – 0, Q2 – 0, Q3 - 6, Q4 – 38
Total of 42 people removed from the waitlist in FY23. Factoring in individuals added during this fiscal year, the waitlist decreased from 168 to 138 Overall this is a 17% decrease in waitlist size for the year.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,262.24	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 3,902.44	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 5,164.68	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	279,310.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 256,820.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$2,000.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 17,640.00	\$
Other Expenses (Specify):	\$2,850.00	\$
Total Expenses:	\$ 279,310.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Hope Center Ministries
Recipient Tax ID #	20-8934436
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	July 1- December 31, 2023
Report Completion Date:	January 25, 2024
Preparer of This Report:	Angie Duncan

Were grant funds expended during this reporting period? Yes X No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

\$7,200.00 was used for HVAC for Goldsboro Men's house to accommodate house renovations and added capacity. HVAC has been completed.

\$35,900 was used for the Goldsboro Women's van purchase in order to provide to meet additional transportation need with added capacity for women to participate in Vocational Training and community activities. Purchase of vans are completed, and they are on site.

\$13,228.12 was used for the new construction related to the Dunn Men's Center for engineering and contractor preliminary services. Services are completed.

\$22,085.50 was used for renovation of garage space for Goldsboro women's center.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

We have expanded our transportation capabilities to accommodate community program participation in the 2 existing Goldsboro centers (men's and women's).

We are in preliminary stages of our construction projects and have engaged local contractors and received preliminary services.

We have completed construction to expand capacity in the Goldsboro women's center.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Capacity at the Goldsboro women's house has increased to 38 women, and we now have the transportation to accommodate that capacity increase due to the van purchase.

Construction site work has begun on the property in Dunn men's center.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Define Project Schedule: We have collected estimates and proposals and would like to select contractors by the end of the first quarter 2024.

Identify Contractors: Contractor has been identified for the Dunn Men's Center. We have met with and interviewed prospective contractors for the Johnston County centers and existing center's renovations.

Site Confirmation: Site confirmed for future Dunn Men's Campus.

Ground Breaking: Projected to break ground between now and the end of first calendar quarter of 2024.

Track Project Progress: We have completed expansion of Goldsboro Women's Center, and we have acquired transportation to accommodate expansion.

Identify Potential Delays or Issues: none at this time

Completion:

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$42,513.62
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0
Other Expenses (Specify): vans, furniture, equipment, septic	\$35,900.00
Total Expenses:	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$42,513.62
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0
Other Expenses (Specify): vans, furniture, equipment, septic	\$35,900.00
Total Expenses:	\$0

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Hope Center Ministries
Recipient Tax ID #	20-8934436
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	January 1- March 31, 2024
Report Completion Date:	April 14, 2024
Preparer of This Report:	Angie Duncan

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Completed purchase of 3rd van for Goldsboro Men's center to accommodate increased capacity.

We have engaged and contracted with a lead engineering firm, architectural firm, and construction project manager for our major construction projects which include 2 family life centers in Wayne County and 2 new Hope Center locations in Johnston and Harnett Counties.

We have begun renovations on Goldsboro Men's Center to increase capacity and accommodate Hope Center programming.

Site development and building permit applications have been submitted to Harnett County agencies to build the Dunn Men's Center which will have capacity for 30 men.

Replaced all HVAC systems in Goldsboro Women's Center to accommodate expanded capacity and renovations.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

In final stages of site design plans and engineered drawings and architectural plans for men's family life center Goldsboro men's center, Women's Goldsboro family life center, and new construction for new Dunn/Harnett County Men's campus. We have received preliminary quotes from multiple contractors for scope of above work. Final quote submissions will be received by May 15, 2024.

Renovations of Goldsboro Men's Center are under way with completion scheduled for July 1, 2024. The renovations will provide for 6-8 additional program beds.

New septic system has been installed at the Goldsboro Men's Campus to increase total capacity to 40 men and to accommodate the future family life center.

We are in final negotiations for 2 possible land donations to accommodate future Johnston County center.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Capacity at the Goldsboro men's house has increased to 36 men, and we now have the transportation to accommodate that capacity increase due to the van purchase.

Established future vocational training contracts to serve the needs of men and women due to expanded capacity in Wayne and Johnston Counties.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Define Project Schedule: Contractors have been selected for all new construction projects.

Identify Contractors: Contractor has been identified for the Dunn Men's Center. We have identified contractors for the Johnston County centers and existing Wayne County center's renovations. We have been working with local inspections and codes and zoning departments to navigate local new construction requirements.

Site Confirmation: Identified prospective land donation for new Johnston County campus located in Clayton, NC.

Ground Breaking: Projected to break ground in second quarter.

Track Project Progress: Renovations are under way at Goldsboro Men's campus and transportation has been purchased to accommodate expanded capacity.

Identify Potential Delays or Issues: Accommodating 3-6 month zoning process that is required in Johnston County.

Completion:

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$14,088.06
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$64,639.50
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,522.49
Other Expenses (Specify): vans, furniture, equipment, septic	\$62,275
Total Expenses:	\$153,525.05

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$14,088.06
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$107,153.12
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,522.49
Other Expenses (Specify): vans, furniture, equipment, septic	\$98,175
Total Expenses:	\$231,938.67

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Hope Center Ministries
Recipient Tax ID #	20-8934436
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	April 1- June 30, 2024
Report Completion Date:	July 10, 2024
Preparer of This Report:	Angie Duncan

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The engineering firm, architectural firm, and construction project manager have completed all engineering drawings for permitting and will begin construction for our major construction projects in July 2024, which include 2 family life centers in Wayne County and 2 new Hope Center locations in Johnston and Harnett Counties. The bidding process has been completed and awards made.

Renovations on Goldsboro Men's Center to increase capacity and accommodate Hope Center programming are 60% complete, with anticipated completion September 1, 2024.

Site development and building permit applications have been approved and issued in Harnett County agencies to build the Dunn Men's Center which will have capacity for 30 men. Contract has been awarded and construction will begin in July 2024, with anticipated completion scheduled April 2025.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Completed site design plans and engineered drawings and architectural plans for men's family life center Goldsboro men's center, Women's Goldsboro family life center, and new construction for new Dunn/Harnett County Men's campus. We have completed the bidding process and contracts have been awarded to General Contractors. Major construction projects are beginning in July 2024, with completion set for April 2025.

Renovations of Goldsboro Men's Center are under way. The scope of renovations for Goldsboro Men's Center have expanded to include exterior improvements and repairs.

We are in final negotiations for 2 possible land donations to accommodate future Johnston County center.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Capacity at both the Goldsboro men's and women's houses have increased to 36 men and women, bringing total Wayne County capacity to 104 program beds.

Expanded vocational training contracts to serve the needs of men and women due to expanded capacity in Wayne and future Johnston County locations.

Expanded resources and community networks to accommodate future Johnston County locations in preparation for opening centers there in 2025.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Define Project Schedule: Contractors have been awarded and are in place for construction projects.

Identify Contractors: Inspections, codes, and zoning departments have approved all new building designs and site plans for Wayne County projects. Johnston County projects are under review and zoning applications will be submitted in the next 2 weeks.

Site Confirmation: Identified prospective land donation for new Johnston County campus located in Clayton, NC. Under legal counsel and review.

Ground Breaking: Ground breaking for Wayne County locations will begin in July.

Track Project Progress: Renovations are under way at Goldsboro Men's campus and are 60% completed. Hired 2 new Recovery Coordinators for Goldsboro Women's Center and Wayne County Men's Center to help accommodate expanded capacity.

Identify Potential Delays or Issues: Accommodating 3-6 month zoning process that is required in Johnston County.

Completion: Transportation needs have been met, some additional staffing is in place, design and engineering phase for all major construction is complete, we have completed the bid process for general contractors, capacity increase in existing homes is complete.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$21,645.43
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$48,102.06
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$
Other Expenses (Specify): vans, furniture, equipment, septic	\$8,030.05
Total Expenses:	\$77,777.54

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$35,733.49
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$155,255.18
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,522.49
Other Expenses (Specify): vans, furniture, equipment, septic	\$106,205.05
Total Expenses:	\$309,716.21

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Mt Calvary Center for Leadership Development
Recipient Tax ID #	84-4644495
Project/Activity Title:	Community Health Worker Program
Reporting Period (Quarter):	Quarter 1 and Quarter 2
Report Completion Date:	01.26.2024
Preparer of This Report:	Lisa Robinson

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Hosted a mobile dental clinic providing free dental services to include extractions, fillings and cleaning.
- Hosted Back-to-School Event and provided resources such as health education and school supplies to attendees.
- Hosted Breast Cancer Awareness Education events in Bladen and Pender Counties
- Hosted Breast Cancer Lunch and Learn Session in New Hanover County to educate the community on early detection and screening.
- Provided members of low-income communities with awareness of Medicaid expansion and qualifying criteria.
- Promoted awareness of safe and sustainable housing, nutritional and health foods and health education at community events.
- Distributed holiday meals to needy families to address food insecurities.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Identified community housing needs to include accessibility.
- Coordinated health and safety inspection.
- Assess client to address barriers and social determinants of health.
- Provided communities with information on specialized programs to include HOP Program, homeless shelters and Medicaid expansion.
- Linked clients to needed resources.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Provided communities with appropriate health and nutritional education and resources.
- Provided advocacy for safe and affordable housing to including meetings with local officials.
- Assisted clients with completion of service applications.
- Promoted awareness of community needs and available program services via radio advertisement, televised advertisements and approved internet-based outlets.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Increased awareness of Community Centered Care Programs to further gain community trust through active engagement at local community events.
- Increased awareness of programs that promote better health to youth and adults by engagement through event participation at local events targeting low-income residents in need of support services and advocacy.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<u>Amount of Appropriation</u>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$74,127.09	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$3,091.79	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$9,149.72	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$13,052.35	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$20,727.45	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$6,781.61	\$0
Other Expenses (Specify):	\$922.23	\$0
Total Expenses:	\$127,852.24	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$74,127.09	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$3,091.79	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$9,149.72	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$13,052.35	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$20,727.45	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$6,781.61	\$0
Other Expenses (Specify):	\$922.23	\$0
Total Expenses:	\$127,852.24	\$0

If there are any questions, please contact the Contract Administrator.

(3) Level III – A recipient or subrecipient that receives, holds, uses, or expends State financial assistance in an amount equal to or greater than five hundred thousand dollars (\$500,000) within its fiscal year.

(b) Agencies shall establish reporting requirements for recipients that meet the following reporting standards on an annual basis:

(1) All recipients and subrecipients shall provide a certification that State financial assistance received or, held was used for the purposes for which it was awarded.

(2) All recipients and subrecipients shall provide an accounting of all State financial assistance received, held, used, or expended.

(3) Level II and III recipients and subrecipients shall report on activities and accomplishments undertaken by the recipient, including reporting on any performance measures established in the contract.

(4) Level III recipients and subrecipients shall have a single or program-specific audit prepared and completed in accordance with Generally Accepted Government Auditing Standards, also known as the Yellow Book.

(c) All reports shall be filed with the disbursing agency in the format and method specified by the agency no later than three months after the end of the recipient's fiscal year, unless the same information is already required through more frequent reporting. Audits must be provided to the funding agency no later than nine months after the end of the recipient's fiscal year.

(d) Agency-established reporting requirements to meet the standards set forth in Paragraph (b) of this Rule shall be specified in each recipient's contract.

(e) Unless prohibited by law, the costs of audits made in accordance with the provisions of this Rule shall be allowable charges to State and Federal awards. The charges may be considered a direct cost or an allocated indirect cost, as determined in accordance with cost principles outlined in the Code of Federal Regulations, 2 CFR Part 200. The cost of any audit not conducted in accordance with this Subchapter shall not be charged to State awards.

(f) Notwithstanding the provisions of this Subchapter, a recipient may satisfy the reporting requirements of Subparagraph (b)(4) of this Rule by submitting a copy of the report required under federal law with respect to the same funds.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Mt Calvary Center for Leadership Development
Recipient Tax ID #	84-4644495
Project/Activity Title:	Community Health Worker Program
Reporting Period (Quarter):	Quarter 3
Report Completion Date:	04.15.2024
Preparer of This Report:	Lisa Robinson

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Hosted interactive Diabetes Empowerment Education Program (DEEP) designed to provide students with resources and education on methodologies to manage and prevent diabetes.
- Promoted health education awareness at community events.
- Sponsored resource booth at community events to distribute health education materials, complete health assessments and assist individuals and families to address social determinates of health.
- Developed a partnership with the University of North Carolina at Pembroke to provide communities with vaccination education.
- Developed a partnership with the Pender County Partnership for Children to provide parents with the essential education to adopt healthy eating habits and food preparation.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Provided communities with health education and information regarding community resources readily available to ensure safe and healthy communities.
- Coordinated housing safety inspections to address mold, pests and unhealthy living conditions.
- Provided communities with information on specialized programs to include HOP Program, homeless shelters and Medicaid expansion.
- Provided individuals with access to Breath Easy products designed to address asthmatic complications, allergies and pulmonary diagnoses.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Assisted clients with locating and securing safe and affordable housing to address homelessness.
- Provided communities with appropriate health and nutritional education and resources.
- Provided advocacy for safe and affordable housing to including meetings with local officials.
- Connected communities to local resources designed to address social determinants of health, access to quality healthcare, preventative screenings and appropriate medication.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Provided education and resources to adults and youth.
- Engaged communities in activities to enhance awareness.
- Increased awareness of Community Centered Care Programs to further gain community trust through active engagement at local community events.
- Increased awareness of programs that promote better health to youth and adults by engagement through event participation at local events targeting low-income residents in need of support services and advocacy.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing):	\$29,060.28	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$600.72	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$729.73	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$6,162.59	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$66,717.93	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$693.27	\$0
Other Expenses (Specify):	\$66.94	\$0
Total Expenses:	\$104,031.46	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing):	\$103,187.37	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$3,692.51	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$9,879.45	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$19,214.94	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$87,445.38	\$0

Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$7,474.88	\$0
Other Expenses (Specify):	\$989.17	\$0
Total Expenses:	\$231,883.70	\$0

If there are any questions, please contact the Contract Administrator.

(3) Level III – A recipient or subrecipient that receives, holds, uses, or expends State financial assistance in an amount equal to or greater than five hundred thousand dollars (\$500,000) within its fiscal year.

(b) Agencies shall establish reporting requirements for recipients that meet the following reporting standards on an annual basis:

- (1) All recipients and subrecipients shall provide a certification that State financial assistance received or, held was used for the purposes for which it was awarded.
- (2) All recipients and subrecipients shall provide an accounting of all State financial assistance received, held, used, or expended.
- (3) Level II and III recipients and subrecipients shall report on activities and accomplishments undertaken by the recipient, including reporting on any performance measures established in the contract.
- (4) Level III recipients and subrecipients shall have a single or program-specific audit prepared and completed in accordance with Generally Accepted Government Auditing Standards, also known as the Yellow Book.

(c) All reports shall be filed with the disbursing agency in the format and method specified by the agency no later than three months after the end of the recipient's fiscal year, unless the same information is already required through more frequent reporting. Audits must be provided to the funding agency no later than nine months after the end of the recipient's fiscal year.

(d) Agency-established reporting requirements to meet the standards set forth in Paragraph (b) of this Rule shall be specified in each recipient's contract.

(e) Unless prohibited by law, the costs of audits made in accordance with the provisions of this Rule shall be allowable charges to State and Federal awards. The charges may be considered a direct cost or an allocated indirect cost, as determined in accordance with cost principles outlined in the Code of Federal Regulations, 2 CFR Part 200. The cost of any audit not conducted in accordance with this Subchapter shall not be charged to State awards.

(f) Notwithstanding the provisions of this Subchapter, a recipient may satisfy the reporting requirements of Subparagraph (b)(4) of this Rule by submitting a copy of the report required under federal law with respect to the same funds.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Mt Calvary Center for Leadership Development
Recipient Tax ID #	84-4644495
Project/Activity Title:	Community Health Worker Program
Reporting Period (Quarter):	Quarter 3
Report Completion Date:	07.15.2024
Preparer of This Report:	Lisa Robinson

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Participated in community events to provide healthcare resources and assessments for social determinants of health. Community Events/Outreach includes the following:
 - (a) Duplin County Disaster Expo
 - (b) Pender County Long-term Recovery Disaster Expo
 - (c) Pender County Blueberry Festival
- Partnered with local farm to distribute fresh fruits and vegetables to address food insecurities in low-income communities.
- Distributed pamphlets and regional resources guide to provide awareness of community resources aimed to address social determinants of health.
- Partnered with Bladen County Division of Aging to prepare and distribute meals to community seniors with food insecurities.
- Partnered with the Food & Farm Worker Program to provide participants with healthcare screenings.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Provided communities with enrollment information on Medicaid Expansion and the Healthy Opportunities Pilot Program.
- Assisted individuals with determining eligibility for the Healthy Opportunities Pilot Program to assist with mortgage/rent, healthy food boxes, moving assistance, housing assessments, payment for utility service, transportation for medical appointments, etc.
- Provided communities with information on mental health and counseling services readily available to meet their needs.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Increase community engagement and outreach activities in Bladen, Brunswick, Columbus, Duplin, New Hanover, Pender, Onslow and Sampson Counties.
- Expanded community outreach and visibility throughout the MCCLD service area providing educational and resource material.
- Development new partnerships designed to ensure the needs of communities are met. Such partnerships include: Bladen County Division of Aging, Pender County Public Schools, US Hispanic Federation, Duplin Disaster Recovery Group, Pender Long-term Recovery Group, Health Opportunities Pilot Program, Tate Farm by the Pond, etc.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Established more than 500 face-to-face contacts centered on social determinants of health.
- Provided education and resources to adults and youth community members. Such health information includes diabetes prevention and management, hypertension screenings, breast cancer self-examination steps, mental health and infant mortality.
- Participated in more than 10 community events and outreach activities in low income and underserved communities.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$48,333.69	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$876.07	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$3,470.39	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$3,578.01	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$12,910.97	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0	\$0
Other Expenses (Specify):	\$1,917.86	\$0
Total Expenses:	\$71,086.99	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$151,521.06	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$4,568.58	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$13,349.84	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$22,792.95	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$100,356.35	\$0

Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$7,474.88	\$0
Other Expenses (Specify):	\$2,907.03	\$0
Total Expenses:	\$302,883.70	\$0

If there are any questions, please contact the Contract Administrator.

(3) Level III – A recipient or subrecipient that receives, holds, uses, or expends State financial assistance in an amount equal to or greater than five hundred thousand dollars (\$500,000) within its fiscal year.

(b) Agencies shall establish reporting requirements for recipients that meet the following reporting standards on an annual basis:

- (1) All recipients and subrecipients shall provide a certification that State financial assistance received or, held was used for the purposes for which it was awarded.
- (2) All recipients and subrecipients shall provide an accounting of all State financial assistance received, held, used, or expended.
- (3) Level II and III recipients and subrecipients shall report on activities and accomplishments undertaken by the recipient, including reporting on any performance measures established in the contract.
- (4) Level III recipients and subrecipients shall have a single or program-specific audit prepared and completed in accordance with Generally Accepted Government Auditing Standards, also known as the Yellow Book.

(c) All reports shall be filed with the disbursing agency in the format and method specified by the agency no later than three months after the end of the recipient's fiscal year, unless the same information is already required through more frequent reporting. Audits must be provided to the funding agency no later than nine months after the end of the recipient's fiscal year.

(d) Agency-established reporting requirements to meet the standards set forth in Paragraph (b) of this Rule shall be specified in each recipient's contract.

(e) Unless prohibited by law, the costs of audits made in accordance with the provisions of this Rule shall be allowable charges to State and Federal awards. The charges may be considered a direct cost or an allocated indirect cost, as determined in accordance with cost principles outlined in the Code of Federal Regulations, 2 CFR Part 200. The cost of any audit not conducted in accordance with this Subchapter shall not be charged to State awards.

(f) Notwithstanding the provisions of this Subchapter, a recipient may satisfy the reporting requirements of Subparagraph (b)(4) of this Rule by submitting a copy of the report required under federal law with respect to the same funds.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Mt Calvary Center for Leadership Development
Recipient Tax ID #	84-4644495
Project/Activity Title:	Community Health Worker Program
Reporting Period (Quarter):	Quarter 4 – REVISION 1
Report Completion Date:	07.15.2024
Preparer of This Report:	Lisa Robinson

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Participated in community events to provide healthcare resources and assessments for social determinants of health. Community Events/Outreach includes the following:
 - (a) Duplin County Disaster Expo
 - (b) Pender County Long-term Recovery Disaster Expo
 - (c) Pender County Blueberry Festival
- Partnered with local farm to distribute fresh fruits and vegetables to address food insecurities in low-income communities.
- Distributed pamphlets and regional resources guide to provide awareness of community resources aimed to address social determinants of health.
- Partnered with Bladen County Division of Aging to prepare and distribute meals to community seniors with food insecurities.
- Partnered with the Food & Farm Worker Program to provide participants with healthcare screenings.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Provided communities with enrollment information on Medicaid Expansion and the Healthy Opportunities Pilot Program.
- Assisted individuals with determining eligibility for the Healthy Opportunities Pilot Program to assist with mortgage/rent, healthy food boxes, moving assistance, housing assessments, payment for utility service, transportation for medical appointments, etc.
- Provided communities with information on mental health and counseling services readily available to meet their needs.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Increase community engagement and outreach activities in Bladen, Brunswick, Columbus, Duplin, New Hanover, Pender, Onslow and Sampson Counties.
- Expanded community outreach and visibility throughout the MCCLD service area providing educational and resource material.
- Development new partnerships designed to ensure the needs of communities are met. Such partnerships include: Bladen County Division of Aging, Pender County Public Schools, US Hispanic Federation, Duplin Disaster Recovery Group, Pender Long-term Recovery Group, Health Opportunities Pilot Program, Tate Farm by the Pond, etc.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Established more than 500 face-to-face contacts centered on social determinants of health.
- Provided education and resources to adults and youth community members. Such health information includes diabetes prevention and management, hypertension screenings, breast cancer self-examination steps, mental health and infant mortality.
- Participated in more than 10 community events and outreach activities in low income and underserved communities.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$48,333.69	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$876.07	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$3,470.39	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$3,578.01	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$26,973.47	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0	\$0
Other Expenses (Specify):	\$1,917.86	\$0
Total Expenses:	\$99,211.99	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$151,521.06	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$4,568.58	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$13,349.84	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$22,792.95	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$114,418.85	\$0

Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$7,474.88	\$0
Other Expenses (Specify):	\$2,907.03	\$0
Total Expenses:	\$317,033.19	\$0

If there are any questions, please contact the Contract Administrator.

(3) Level III – A recipient or subrecipient that receives, holds, uses, or expends State financial assistance in an amount equal to or greater than five hundred thousand dollars (\$500,000) within its fiscal year.

(b) Agencies shall establish reporting requirements for recipients that meet the following reporting standards on an annual basis:

- (1) All recipients and subrecipients shall provide a certification that State financial assistance received or, held was used for the purposes for which it was awarded.
- (2) All recipients and subrecipients shall provide an accounting of all State financial assistance received, held, used, or expended.
- (3) Level II and III recipients and subrecipients shall report on activities and accomplishments undertaken by the recipient, including reporting on any performance measures established in the contract.
- (4) Level III recipients and subrecipients shall have a single or program-specific audit prepared and completed in accordance with Generally Accepted Government Auditing Standards, also known as the Yellow Book.

(c) All reports shall be filed with the disbursing agency in the format and method specified by the agency no later than three months after the end of the recipient's fiscal year, unless the same information is already required through more frequent reporting. Audits must be provided to the funding agency no later than nine months after the end of the recipient's fiscal year.

(d) Agency-established reporting requirements to meet the standards set forth in Paragraph (b) of this Rule shall be specified in each recipient's contract.

(e) Unless prohibited by law, the costs of audits made in accordance with the provisions of this Rule shall be allowable charges to State and Federal awards. The charges may be considered a direct cost or an allocated indirect cost, as determined in accordance with cost principles outlined in the Code of Federal Regulations, 2 CFR Part 200. The cost of any audit not conducted in accordance with this Subchapter shall not be charged to State awards.

(f) Notwithstanding the provisions of this Subchapter, a recipient may satisfy the reporting requirements of Subparagraph (b)(4) of this Rule by submitting a copy of the report required under federal law with respect to the same funds.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Mt Calvary Center for Leadership Development
Recipient Tax ID #	84-4644495
Project/Activity Title:	Community Health Worker Program
Reporting Period (Quarter):	Quarter 4 – REVISED 2
Report Completion Date:	07.15.2024
Preparer of This Report:	Lisa Robinson

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Participated in community events to provide healthcare resources and assessments for social determinants of health. Community Events/Outreach includes the following:
 - (a) Duplin County Disaster Expo
 - (b) Pender County Long-term Recovery Disaster Expo
 - (c) Pender County Blueberry Festival
- Partnered with local farm to distribute fresh fruits and vegetables to address food insecurities in low-income communities.
- Distributed pamphlets and regional resources guide to provide awareness of community resources aimed to address social determinants of health.
- Partnered with Bladen County Division of Aging to prepare and distribute meals to community seniors with food insecurities.
- Partnered with the Food & Farm Worker Program to provide participants with healthcare screenings.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Provided communities with enrollment information on Medicaid Expansion and the Healthy Opportunities Pilot Program.
- Assisted individuals with determining eligibility for the Healthy Opportunities Pilot Program to assist with mortgage/rent, healthy food boxes, moving assistance, housing assessments, payment for utility service, transportation for medical appointments, etc.
- Provided communities with information on mental health and counseling services readily available to meet their needs.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Increase community engagement and outreach activities in Bladen, Brunswick, Columbus, Duplin, New Hanover, Pender, Onslow and Sampson Counties.
- Expanded community outreach and visibility throughout the MCCLD service area providing educational and resource material.
- Development new partnerships designed to ensure the needs of communities are met. Such partnerships include: Bladen County Division of Aging, Pender County Public Schools, US Hispanic Federation, Duplin Disaster Recovery Group, Pender Long-term Recovery Group, Health Opportunities Pilot Program, Tate Farm by the Pond, etc.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Established more than 500 face-to-face contacts centered on social determinants of health.
- Provided education and resources to adults and youth community members. Such health information includes diabetes prevention and management, hypertension screenings, breast cancer self-examination steps, mental health and infant mortality.
- Participated in more than 10 community events and outreach activities in low income and underserved communities.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$48,333.69	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$876.07	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$3,470.39	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$3,578.01	\$0
Property and Equipment Expenses (e.g., buildings and improvements): 3	\$26,973.47	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0	\$0
Other Expenses (Specify):	\$1,917.86	\$0
Total Expenses:	\$85,149.49	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program related staffing)	\$151,521.06	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$4,568.58	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$13,349.84	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$22,792.95	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$114,418.85	\$0

Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$7,474.88	\$0
Other Expenses (Specify):	\$2,907.03	\$0
Total Expenses:	\$317,033.19	\$0

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Dental Society Foundation
Recipient Tax ID #	82-0880561
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	July 1, 2023, to December 31, 2023
Report Completion Date:	January 26 th 2024
Preparer of This Report:	Sharon D'costa- Fund Development and Program Director, NCDSF

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCDSF worked closely with NCDHHS's Division of Budget and Analysis team to finalize the budget and contract related to this grant. Simultaneously, within the North Carolina Dental Society Foundation, efforts have been on to plan Missions of Mercy clinics toward which this grant will be used.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Thus far, no project objectives have been met but efforts are on toward planning a 45-chair Missions of Mercy clinic in Asheville in September toward which the grant funds will be used.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Not applicable currently as grant funds were not yet received, and no activities or expenditures occurred.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Not applicable currently as grant funds were not yet received, and no activities or expenditures occurred

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<i>Amount of Appropriation</i>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 0	\$ 0
Supplies and Materials Expenses (e.g., office supplies):	\$ 0	\$ 0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 0	\$ 0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0	\$ 0
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0	\$ 0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 0	\$ 0
Other Expenses (Specify):	\$ 0	\$ 0
Total Expenses:	\$ 0	\$ 0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<i>Amount of Appropriation</i>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 0	\$ 0
Supplies and Materials Expenses (e.g., office supplies):	\$ 0	\$ 0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 0	\$ 0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0	\$ 0
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0	\$ 0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 0	\$ 0
Other Expenses (Specify):	\$ 0	\$ 0
Total Expenses:	\$ 0	\$ 0

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Report Template A: Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Dental Society Foundation
Recipient Tax ID #	82-0880561
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	January 1, 2024 – March 31, 2024
Recipient's Fiscal Year End:	October 31 st
Report Completion Date:	April 15th 2024
Preparer of This Report:	Sharon D'costa- Fund Development and Program Director, NCDSF

1. Provide a brief description of the entity's mission, purpose, and governance structure.

The NC Dental Society Foundation is an affiliated 501c3 charitable arm of the NC Dental Society. The mission of the Foundation is to help dentists help patients, and it does this through education, prevention, and treatment of adults and children through free-clinic settings and support of local community clinics. The NC Missions of Mercy (NC MOM) dental clinics are a signature program of the NC Dental Society Foundation. Adult patients with severe dental needs - whose family income does not exceed 200% of the federal poverty guidelines - are treated at no cost to them or their families. The NC Missions of Mercy clinic program has provided more than \$37 million in dental care to over 71,025 adult patients – at no charge to them.

2. Provide a brief description of the types of programs, services, and activities supported by State Fiscal Year 2023/2024 Directed Grant.

The State grant is being used to support the expansion of 45-chair NCMOM and mini-MOM clinics across North Carolina. A mini-MOM clinic is being scheduled at the end of April at Central Piedmont Community Colleges and equipment has been purchased using the state funds. A 45- chair clinic has been scheduled at Asheville on September 6th and 7th and plans are underway to host a clinic later this year at Elkin.

3. Provide the number of persons served by the programs, services, and activities supported by these funds, including the counties in which services are provided.

Thus far since no clinics have been held, there are no impact numbers to report on.

4. Provide a summary of deliverables, outputs, and outcomes that demonstrate the impact and effectiveness of the programs, services, and activities supported by these funds.

The impact and effectiveness of the MOM program is measured by the total number of patients served at each clinic as well as the \$ value of services provided to the patients receiving treatment.

5. Have there been any significant changes to the intended goals, Scope of Work, and/or planned budget during this reporting period (quarter)? If so, please provide an explanation here.

There haven't been any significant changes to the intended goals, Scope of Work, and/or planned budget during this reporting period.

6. Provide any other pertinent information about the progress of the programs, services, and activities supported by these funds.

- Thus far, the equipment and supplies needed to treat patients at the upcoming Mini-MOM clinic at CPCC have been purchased using State-directed funds. The contractual expenses cover hourly pay for a part-time resource hired to sort through all the clinic-related supplies and equipment in storage.

7. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	0
Supplies and Materials Expenses (e.g., office supplies):	\$20,601.86
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$1848
Property and Equipment Expenses (e.g., buildings and improvements):	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$312
Other Expenses (Specify):	\$
Total Expenses:	\$22,761.86

8. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$
Supplies and Materials Expenses (e.g., office supplies):	\$20,601.86
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$1848
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$312
Other Expenses (Specify):	\$
Total Expenses:	\$22,761.86

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Report Template A: Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Dental Society Foundation
Recipient Tax ID #	82-0880561
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	April 1, 2024 – June 30, 2024
Recipient's Fiscal Year End:	October 31 st
Report Completion Date:	July 15th 2024
Preparer of This Report:	Sharon D'costa- Fund Development and Program Director, NCDSF

1. Provide a brief description of the entity's mission, purpose, and governance structure.

The NC Dental Society Foundation is an affiliated 501c3 charitable arm of the NC Dental Society. The mission of the Foundation is to help dentists help patients, and it does this through education, prevention, and treatment of adults and children through free-clinic settings and support of local community clinics. The NC Missions of Mercy (NC MOM) dental clinics are a signature program of the NC Dental Society Foundation. Adult patients with severe dental needs - whose family income does not exceed 200% of the federal poverty guidelines - are treated at no cost to them or their families. The NC Missions of Mercy clinic program has provided more than \$37 million in dental care to over 72,000 adult patients – at no charge to them.

2. Provide a brief description of the types of programs, services, and activities supported by State Fiscal Year 2023/2024 Directed Grant.

The State grant is being used to support the expansion of 45-chair MOM and mini-MOM clinics across North Carolina. A mini-MOM clinic was held on April 27th at Central Piedmont Community College (CPCC). A 45- chair clinic has been scheduled at Asheville on September 6th and 7th followed by another mini-MOM clinic at CPCC in the fall of 2024. Further, plans are underway to host 45-chair clinics early next year at Elkin and High Point respectively.

3. Provide the number of persons served by the programs, services, and activities supported by these funds, including the counties where services are provided.

Thus far, through the mini-MOM clinic held in Charlotte, 92 patients have been provided with treatment worth \$56,746.

4. Provide a summary of deliverables, outputs, and outcomes that demonstrate the impact and effectiveness of the programs, services, and activities supported by these funds.

The impact and effectiveness of the MOM program is measured by the total number of patients served at each clinic as well as the \$ value of services provided to the patients receiving treatment.

5. Have there been any significant changes to the intended goals, Scope of Work, and/or planned budget during this reporting period (quarter)? If so, please provide an explanation here.

There haven't been any significant changes to the intended goals, Scope of Work, and/or planned budget during this reporting. NCDS Foundation requested an amendment to the original proposal to include the purchase of a van that would be used to transport equipment and temperature-controlled dental supplies needed for each MOM clinic.

6. Provide any other pertinent information about the progress of the programs, services, and activities supported by these funds.

Thus far, the equipment and supplies needed to treat patients at the upcoming Mini-MOM clinic at CPCC have been purchased using State-directed funds. The contractual expenses cover hourly pay for a part-time resource hired to sort through all the clinic-related supplies and equipment in storage.

7. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$30,330.23
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$2040
Property and Equipment Expenses (e.g., buildings and improvements):	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0
Other Expenses (Specify):	\$
Total Expenses:	\$32,370.23

8. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$
Supplies and Materials Expenses (e.g., office supplies):	\$50,932.09
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$3888
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$312
Other Expenses (Specify):	\$
Total Expenses:	\$55,132.09

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Association of Free & Charitable Clinics, Inc. (NCAFCC)
Recipient Tax ID #	56-2062170
Project/Activity Title:	SL 2023-134 Directed Grant
Reporting Period (Quarter):	October 2024 (from 7/1/24 – 9/30/24)
Report Completion Date:	10/15/24
Preparer of This Report:	Allison Kelly

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes X No (There are costs incurred during this time period that we may apply to the grant at a later time.)

Was any interest earned on these grant funds during this reporting period? X Yes No

If Yes, specify the amount of interest earned over the life of the grant through this reporting period: \$44,924.05

Do you certify that all funds expended to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

Did you make any subawards of this funding during this reporting period? X Yes No

If yes, attach a list of subawards including subrecipient entity name, tax ID number, subaward amount, and an indication that the subrecipient is not on the [State Suspension of Funding List](#) or suspended or debarred from receiving federal funds if applicable. Please note that per the contract terms and conditions and State law, your organization is responsible for ensuring that any subrecipients comply with all requirements of your contract and provide you with adequate and timely information to fulfill your reporting obligations.

Final reports should be submitted once all funds are expended and grant activities are completed. Is this your final quarterly report? Yes X No

If yes, please complete and sign below indicating that all expenses have been submitted and all funds and any interest earned were used for the purposes for which they were awarded and in compliance with the contract. Please note that all records pertaining to this grant must be retained for a minimum of five years or until all audit exceptions have been resolved, whichever is longer. If the contract is subject to federal policy and regulations, record retention may be longer than five years. Recipients are required to maintain reports and accounting records that support the allowable expenditure of State funds and shall make available all reports and records for inspection by the NC Department of Health and Human Services, the Office of State Budget and Management, and the Office of the State Auditor for oversight, monitoring, and evaluation purposes.

April Cook, Chief Executive Officer
Name and Title of Organization Official



Signature of Organization Official

October 15, 2024
Date

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCAFCC provided support to its 69 Member free and charitable clinics, enabling them to serve uninsured and underinsured patients across North Carolina. Highlights during this reporting period include further progress with launching our regional mobile dental program comprised of NCAFCC member clinic patients in and around the Charlotte-Mecklenburg area and surrounding counties. In this reporting period, we started serving regional clinic patients with dental services. The mobile dental unit visited Cook Community Clinic, Matthews Free Medical Clinic, Community Free Clinic, HealthReach Community Clinic and Hope Community Clinic of East Charlotte.

Additionally, in September, NCAFCC hosted its second quarterly dental networking groups for all member clinics who are engaged in dental services now or would like to be. In the September meeting, Dr. Saba Mokry, a Dentist at NCAFCC Member Wake Smiles and Assistant Professor at UNC Adams School of Dentistry, shared about providing oral health services with limited resources.

The NCAFCC team is also working on several initiatives that align with our strategic objectives. Currently there are plans to evaluate access to free and charitable clinics through mobile health services for the uninsured and underserved in the 15 North Carolina counties where no free and charitable member clinics currently exist. Several funders have expressed interest in supporting free and charitable mobile expansion in the northern and northeastern section of the state for a number of counties where no free and charitable care currently exists. Additionally, NCAFCC's efforts to expand behavioral health regionally continue to develop as well. Specifically, we are exploring tele-psychiatry and tele-behavioral health services for regional expansion as well in the coming years. These regional efforts have potential for increased cost-efficiency through the sharing of services among clinics in each region. Our vision is to ensure that North Carolinians in all 100 counties of the state have access to free and charitable medical, dental, behavioral health, pharmacy and social services. Additionally, NCAFCC continues to provide significant support to its Members during Medicaid expansion. NCAFCC has not only extensively prepared Members leading up to expansion with resources and guidance, but also continue to support them through the transition, as they make decisions that will affect their operations, staff and volunteers in the years to come.

The NCAFCC 2024 Annual Conference will occur on October 24 – 25, 2024. During this reporting period, a great deal of planning has occurred to line up sponsors, exhibitors, speakers and attendees for the conference. As it is our first in-person annual conference since 2019, we are excited for this time together with Members and Partners.

We are also in the process of mobilizing resources and relief funding to our Member clinics who are in counties declared in the Hurricane Helene disaster declaration. Thankfully, none of our Member clinics in the western part of the state sustained major damage, but they are navigating exceptionally difficult circumstances and strong community need as they try to recover and rebuild.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The objectives outlined in our Scope of Work were the following and which are still underway and have been updated in the October 2024 reporting period after the publication of the NCAFCC 2023 Annual Report in August 2024:

1) Uninsured and underinsured patients in NC will have necessary medical, dental, pharmacy, behavioral/mental health and social services care provided at no cost or minimal cost.

As of the publication of NCAFCC's 2023 Annual Report, NCAFCC Members served more than 75,814 uninsured and underserved patients across 85 of North Carolina's 100 counties (as compared to 80,090 in 2022; 82,480 in 2021 and 76,911 in 2020). Additionally, 200,108 total provider visits were conducted in 2023, representing a slight increase in total visits over 2022. Improvement was made with diabetes outcomes in 2023, with 25.2% of patients in 2022 with a Hemoglobin A1c over 9.0% or no A1c performed (as compared to 26.4% in 2022, 29% in 2021 and 30.9% in 2020). Improvement was also made with hypertension outcomes in 2023 with 62.6% of patients with blood pressure under 140/90 (as compared to 58.6% in 2022, 55.6% in 2021 and 55.3% in 2020). The Total Value of Services to Community-At-Large (patients and others in the community) was \$364,214,235 and the Value of Services per Patient was \$3,940.18. For every \$1 spent, \$5.57 in healthcare services were provided. Finally, the Value of Prescription Medications provided to patients was \$186,312,023.

2) Regional expansion of integrated dental and behavioral/mental health care services within free and charitable clinics to better meet the needs of uninsured and underinsured patients across NC.

NCAFCC's 2023 Annual Report also showed that 31 Members provided behavioral/mental health services to patients and 22 provided dental services. New outcomes measures for both behavioral health and dental have been introduced into NCAFCC's 2023 Annual Survey to better define progress with expansion of these services.

3) Emergency department diversion savings - patients eligible for free and charitable clinic care will receive health care at free and charitable clinics rather than emergency departments.

In 2023, estimated hospital emergency department diversion savings was \$372,625,810 for NCAFCC Members. This estimate is based on averting one emergency department visit for each free and charitable clinic patient served according to the cost of a treat and release emergency department visit per the Sheps Center:
<https://www.shepscenter.unc.edu/data/nc-hospital-discharge-data/descriptive-statistics/>

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The expected results outlined in NCAFCC's Scope of Work were the following and are still underway and have been in the October 2024 reporting period after the publication of the NCAFCC 2023 Annual Report in August 2024:

1) Sustainability of Member organizations' ability to continue to provide free and charitable care in their communities.

NCAFCC Members are currently navigating changes in their operations related to Medicaid expansion and our Western NC Members are now struggling with the aftermath of Hurricane Helene. Many patients have become eligible for Medicaid in the last 9 months and staff at Member clinics continue to support their transition to new medical homes, as most NCAFCC Members are not Medicaid providers. At the same time, our Members are engaging in new outreach to bring new individuals into their patient populations, focusing on those who are not eligible for Medicaid and remain uninsured after expansion. NCAFCC Members are now predominantly serving those who are uninsured at 139% - 250% (or 300%, in some cases) of FPL. We are seeing stabilization of patient volume at clinics over the last couple of months, as we understand Medicaid enrollment has peaked.

2) Growth in total active patient population for NCAFCC membership to impact as many as possible of the estimated 700,000 who will remain uninsured after Medicaid expansion in NC.

Active patient population declined in 2023, over 2022, 2021 and 2020. Our Members continue to seek out those who remain uninsured after Medicaid expansion.

3) Greater diversity in race/ethnicity of patients served to contribute to health equity efforts at member organizations.

With approximately 30% of patients served by our Members being Non-Hispanic/Latino White, greater diversity in our Members patient populations is occurring. Also, nearly 44% of patients served by our Members are Hispanic/Latino.

4) Improved health outcomes for diabetes/hypertension, as measured by annual diabetes and hypertension outcomes.

Health outcomes measures for diabetes and hypertension have improved steadily since 2020.

5) Increased emergency department diversion savings.

Emergency department savings have grown year over year since 2020.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

During the last reporting period, NCAFCC Members reported the following patient outcomes in their grant reporting:

Reporting Period	# of Members Reporting	Total # of Unduplicated Patients	Total # of Established Patients Seen	Total # of New Patients Seen
January 2024 (07/01/23 – 12/31/23)	47	53,861	40,274	10,805
April 2024 (01/01/24 – 03/31/24)	54	61,417	34,965	5554
July 2024 (04/01/24 – 06/30/24)	55	53,867	22,015	4296
Total				20,655

At this time, NCAFCC has received 61 grant agreements from our Members and 58 of these have final, executed agreements. We are projecting 60-64 Member organizations to engage in this directed grant. At this time, we are distributing amended member contracts to all of our Members per the legislative change in SL2024-1. We expect this process to be complete by the end of 2024.

Quarterly Grant Reporting Measures:

- 1) Active patient population (total number of unduplicated, uninsured and under-insured patients at the time of reporting): 53,867
- 2) Total number of established patients served since the beginning of the period of performance: 169,145 (please note, this is not an unduplicated count)
- 3) Total number of new patients served since the beginning of the period of performance: 20,655

Measures reported on the NCAFCC Annual Survey Reports for 2023, 2024 and 2025 (reports will be available in July 2024, July 2025 and July 2026, respectively) on end of year reporting, to include:

- 1) Total patients served annually by race/ethnicity
- 2) Total annual medical/dental/behavioral health visits performed
- 3) Annual diabetes control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 4) Annual hypertension control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 5) Annual estimated emergency department diversion savings

Please see summary of Annual Survey Report for 2023 in question #2 above.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$86,408.52
Supplies and Materials Expenses (e.g., office supplies):	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$3723.60
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$7973.93
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$3102.75
Other Expenses (Specify): Member Subawards	\$1,119,764.49
Total Expenses:	\$1,220,973.29

6. Provide a summary of all grant expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

Expenditure Category	Amount of Expenditure
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$351,471.16
Supplies and Materials Expenses (e.g., office supplies):	\$1000.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$5304.25
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$49,332.69
Property and Equipment Expenses (e.g., buildings and improvements):	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$15,102.75
Other Expenses (Specify): Member Subawards	\$3,655,316.63
Total Expenses:	\$4,077,527.48

Please contact your Contract Administrator with any questions.

NCAFCC Member Sub Awards – Confirmed None are On Suspension List

NCAFCC Member	Award Amount as of 9/30/24
ABCCM Medical Ministry	\$ 147,500.00
Alliance Medical Ministry	\$ 147,500.00
Blue Ridge Free Dental Clinic	\$ 39,770.00
Broad Street Clinic Foundation	\$ -
Camino Clinic	\$ -
Campbell University Community Care Clinic	\$ 58,970.00
Cape Fear Clinic	\$ 44,270.00
CARE Clinic, Inc, The	\$ 70,775.00
Care Ring	\$ 147,500.00
Chatham CARES Community Pharmacy	\$ 16,270.00
Christ Community Clinic	\$ 14,570.00
Community Care Center - Winston-Salem	\$ 118,670.00
Community Care Clinic - Boone	\$ 49,870.00
Community Care Clinic of Dare	\$ 58,470.00
Community Care Clinic of Franklin	\$ 23,270.00
Community Care Clinic of Highland-Cashiers	\$ -
Community Care Clinic of Rowan County	\$ 90,575.00
Community Clinic of High Point	\$ 86,977.50
Community Free Clinic	\$ 37,770.00
Community Health Services of Union County	\$ 47,070.00
Clinic)	\$ 102,267.93
Crisis Control Ministry Pharmacy	\$ 33,970.00

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Association of Free & Charitable Clinics, Inc. (NCAFCC)
Recipient Tax ID #	56-2062170
Project/Activity Title:	SL 2023-134 Directed Grant
Reporting Period (Quarter):	January 2024 (from 7/1/23 – 12/31/23)
Report Completion Date:	01/26/24
Preparer of This Report:	Allison Kelly

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No (NCAFCC's Members are still working on completing agreements and submitting reporting for this reporting period since NCAFCC's final, executed agreement was received on 12/08/23 and the initial payment was received on 1/19/24).

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCAFCC provided support to its 69 Member free and charitable clinics, enabling them to serve uninsured and underinsured patients across North Carolina. Highlights during this reporting period include the launch of a regional mobile dental program comprised of NCAFCC member clinics in Region 4 for free and charitable clinic patients in and around the Charlotte-Mecklenburg area and surrounding counties. A ribbon cutting, regional planning efforts and trainings have been held to date. Our next steps are to purchase dental equipment and supplies for the unit so as to deploy the unit to provide services to Member free and charitable clinic patients early in 2024.

Additionally, NCAFCC has provided significant support to its Members during Medicaid expansion. Through regional meetings and providing a Medicaid expansion toolkit to Members, we have equipped them to navigate the expansion process with their patient base. We are enthusiastic that some free and charitable clinic patients will receive Medicaid coverage now and our Members are working to transition them seamlessly to their new providers. At the same time, we also recognize that there will still be 700,000 patients remaining uninsured after expansion. Our collective task remains to ensure these individuals know that a free and charitable clinic may be an option for them and begin onboarding more of these patients at Member clinics.

In November 2023, we held our Annual Members Meeting virtually, welcoming 125 people for a roundtable discussion with free and charitable clinic executives from across the country whose states have expanded Medicaid in the past or are in the midst of expansion now. Common themes included an initial drop in free and charitable clinic patient counts and a substantial rebound within a year or two of expansion. Additionally, free and charitable clinics sustained themselves through expansion through communication of continued need for clinics dedicated primarily to serving those who are uninsured, outreach to new communities, expansion of service types and adjusting eligibility criteria.

NCAFCC's 2023 Annual Survey has been developed and will be released to Members on or before February 1, 2024. Publication of NCAFCC's 2023 Annual Report is expected in July 2024.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The objectives outlined in our Scope of Work were the following and which are still underway:

1) Uninsured and underinsured patients in NC will have necessary medical, dental, pharmacy, behavioral/mental health and social services care provided at no cost or minimal cost.

As of the publication of NCAFCC's 2022 Annual Report in July 2023, NCAFCC Members served more than 80,090 uninsured and underserved patients across 87 of North Carolina's 100 counties, as compared to 82,480 patients in 2021 and 76,911 in 2020. Additionally, 199,743 total provider visits were conducted in 2022, representing an increase of 10,856 total visits over 2021. Improvement was made with diabetes outcomes in 2022, with 26.4% of patients in 2022 with a Hemoglobin A1c over 9.0% or no A1c performed, as compared to 29% in 2021 and 30.9% in 2020. Improvement was also made with hypertension outcomes in 2022 with 58.6% of patients in 2022 with blood pressure under 140/90 compared to 55.6% in 2021 and 55.3% in 2020. In summary, although the number of patients served in 2022 was 3% lower than 2021, Members reported higher provider visits in 2022 over 2021 and better outcomes for diabetes and hypertension overall, as compared to the last two years. The Total Value of Services to Community-At-Large (patients & others in the community) was \$347,321,434 and the Value of Services per Patient was \$3,535.36. For every \$1 spent, \$5.42 in healthcare services were provided. Finally, the Value of Prescription Medications provided to patients was \$189,462,861.

2) Regional expansion of integrated dental and behavioral/mental health care services within free and charitable clinics to better meet the needs of uninsured and underinsured patients across NC.

NCAFCC's 2022 Annual Report also showed that 34 Members provided behavioral/mental health services to patients and 16 provided dental services. Two new dental clinics have opened in rural member clinics (Dare and Moore counties) in this reporting period, in addition to the regional expansion of mobile dental services in and around Mecklenburg County mentioned previously. New outcomes measures for both behavioral health and dental have been introduced into NCAFCC's 2023 Annual Survey to better define progress with expansion of these services.

3) Emergency department diversion savings - patients eligible for free and charitable clinic care will receive health care at free and charitable clinics rather than emergency departments.

In 2022, estimated hospital emergency department diversion savings was \$358,482,840 for NCAFCC Members. This estimate is based on averting one emergency department visit for each free and charitable clinic patient served according to the cost of a treat and release emergency department visit per the Sheps Center:

<https://www.shepscenter.unc.edu/data/nc-hospital-discharge-data/descriptive-statistics/>

As mentioned previously, NCAFCC's 2023 Annual Survey has been developed and will be released to Members on or before February 1, 2024. Publication of NCAFCC's 2023 Annual Report is expected in July 2024. Updated data will be provided for the above objectives at that time.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The expected results outlined in NCAFCC's Scope of Work were the following and are still underway:

1) Sustainability of Member organizations' ability to continue to provide free and charitable care in their communities.

NCAFCC Members are currently navigating changes in their operations related to Medicaid expansion. Many patients have become eligible for Medicaid and staff at Member clinics are supporting their transition to new medical homes, as most NCAFCC Members are not Medicaid providers. At the same time, they are engaging in new outreach to bring new individuals into their patient populations, focusing on those who are not eligible for Medicaid and remain uninsured after expansion. NCAFCC Members are now predominantly serving those who are uninsured at 139% - 250% (or 300%, in some cases) of FPL.

2) Growth in total active patient population for NCAFCC membership to impact as many as possible of the estimated 700,000 who will remain uninsured after Medicaid expansion in NC.

This information will more readily available once Members complete NCAFCC's 2023 Annual Survey in February 2024. NCAFCC's 2023 Annual Report will be published in July 2024.

3) Greater diversity in race/ethnicity of patients served to contribute to health equity efforts at member organizations.

This information will more readily available once Members complete NCAFCC's 2023 Annual Survey in February 2024. NCAFCC's 2023 Annual Report will be published in July 2024.

4) Improved health outcomes for diabetes/hypertension, as measured by annual diabetes and hypertension outcomes.

This information will more readily available once Members complete NCAFCC's 2023 Annual Survey in February 2024. NCAFCC's 2023 Annual Report will be published in July 2024.

5) Increased emergency department diversion savings.

This information will more readily available once Members complete NCAFCC's 2023 Annual Survey in February 2024. NCAFCC's 2023 Annual Report will be published in July 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

We have not yet been able to capture performance measures from our Membership, as most have not yet submitted their first reporting documents for this grant given the start during the holidays. We are currently working to contract our Members into this directed grant, as well as collect reporting for the 07/01/23 – 12/31/23 time period.

At this time, we have received 38 grant agreements from our Members and 28 of these have final, executed agreements. Reporting for the period of 7/1/23 – 12/31/23 is still being received from our Members (17 have submitted to date) and will be reported on during the next quarterly reporting period in April 2024. We are projecting 64 Member organizations to engage in this directed grant.

Quarterly Grant Reporting Measures:

- 1) Active patient population (total number of unduplicated, uninsured and under-insured patients at the time of reporting)
- 2) Total number of established patients served since the beginning of the period of performance.
- 3) Total number of new patients served since the beginning of the period of performance

Additionally, as mentioned previously, the 2023 Annual Survey will be released to Members on 2/1/24, so updates on these measures will be available in July 2024.

Measures reported on the NCAFCC Annual Survey Reports for 2023, 2024 and 2025 (reports will be available in July 2024, July 2025 and July 2026, respectively) on end of year reporting, to include:

- 1) Total patients served annually by race/ethnicity
- 2) Total annual medical/dental/behavioral health visits performed
- 3) Annual diabetes control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 4) Annual hypertension control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 5) Annual estimated emergency department diversion savings

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$103,445.54	\$
Supplies and Materials Expenses (e.g., office supplies):	\$821.70	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$1340.79	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$19,972.78	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,000.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$137,580.81	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$103,445.54	\$
Supplies and Materials Expenses (e.g., office supplies):	\$821.70	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$1340.79	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$19,972.78	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,000.00	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$137,580.81	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Association of Free & Charitable Clinics, Inc. (NCAFCC)
Recipient Tax ID #	56-2062170
Project/Activity Title:	SL 2023-134 Directed Grant
Reporting Period (Quarter):	April 2024 (from 1/1/24 – 3/31/24)
Report Completion Date:	04/15/24
Preparer of This Report:	Allison Kelly

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No (Our members have reported for the April reporting period which covers the 1/1/24 - 3/31/24 period and NCAFCC is currently reviewing and approving reimbursements to members for this reporting. This aggregated information will be reported in NCAFCC's July 2024 report, just as we've reported January 2024 member information in this report.)

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCAFCC provided support to its 69 Member free and charitable clinics, enabling them to serve uninsured and underinsured patients across North Carolina. Highlights during this reporting period include further progress with launching our regional mobile dental program comprised of NCAFCC member clinic patients in and around the Charlotte-Mecklenburg area and surrounding counties. In this reporting period, we contracted with a dentist as a consultant for the project, purchased dental equipment and supplies for the unit and submitted the radiation protection certification to the state for approval. Although delayed, we anticipate starting to serve regional clinic patients in early summer 2024. Additionally, beginning in May, NCAFCC will host quarterly dental networking groups facilitated by the contracted dentist for all member clinics who are engaged in dental services now, or would like to be.

Additionally, NCAFCC continues to provide significant support to its Members during Medicaid expansion. The experience of clinics has varied depending on their location, the patients they serve and services they provide. For some Members, they are seeing a relatively small number of patients transition to Medicaid and are continuing to support those who may not be able to get connected right away to a provider to ensure they maintain their health during the transition. Others are continuing to manage a significant number of patients waiting to be connected with a Medicaid provider. Some are seeing an increase in patients coming to their clinics, including a higher number of undocumented patients. For some other member clinics though, particularly in rural areas, they are seeing a steep increase in the numbers of patients leaving their clinics and are actively trying to navigate this challenge. NCAFCC has not only extensively prepared Members leading up to expansion with resources and guidance, but also continue to support them through the transition, as they make decisions that will affect their operations, staff and volunteers in the years to come.

NCAFCC hired two new staff members in the month of March - a part-time Administrative Assistant and a full-time Project Manager. Both individuals will be assigned to this project, as the work they will be doing will support sustainability of Members following pandemic Medicaid unwinding, as well as the concurrent expansion of Medicaid. Their work will focus on supporting and growing NCAFCC's capacity through new technology platforms, research and grant writing, as well as helping to expand behavioral health and oral health regional initiatives.

We are currently validating data from NCAFCC's 2023 Annual Survey from our Members. We plan to publish NCAFCC's 2023 Annual Report in July after the data review is complete. This information will inform annual outcomes on this grant in July 2024. Additionally, NCAFCC released a quarterly survey to Members that will quantify the impact of Medicaid expansion upon our Members. We will continue to release these Medicaid expansion surveys quarterly throughout expansion and hope to include this information in future reports as well.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The objectives outlined in our Scope of Work were the following and which are still underway:

1) Uninsured and underinsured patients in NC will have necessary medical, dental, pharmacy, behavioral/mental health and social services care provided at no cost or minimal cost.

As of the publication of NCAFCC's 2022 Annual Report in July 2023, NCAFCC Members served more than 80,090 uninsured and underserved patients across 87 of North Carolina's 100 counties, as compared to 82,480 patients in 2021 and 76,911 in 2020. Additionally, 199,743 total provider visits were conducted in 2022, representing an increase of 10,856 total visits over 2021. Improvement was made with diabetes outcomes in 2022, with 26.4% of patients in 2022 with a Hemoglobin A1c over 9.0% or no A1c performed, as compared to 29% in 2021 and 30.9% in 2020. Improvement was also made with hypertension outcomes in 2022 with 58.6% of patients in 2022 with blood pressure under 140/90 compared to 55.6% in 2021 and 55.3% in 2020. In summary, although the number of patients served in 2022 was 3% lower than 2021, Members reported higher provider visits in 2022 over 2021 and better outcomes for diabetes and hypertension overall, as compared to the last two years. The Total Value of Services to Community-At-Large (patients & others in the community) was \$347,321,434 and the Value of Services per Patient was \$3,535.36. For every \$1 spent, \$5.42 in healthcare services were provided. Finally, the Value of Prescription Medications provided to patients was \$189,462,861.

2) Regional expansion of integrated dental and behavioral/mental health care services within free and charitable clinics to better meet the needs of uninsured and underinsured patients across NC.

NCAFCC's 2022 Annual Report also showed that 34 Members provided behavioral/mental health services to patients and 16 provided dental services. Two new dental clinics have opened in rural member clinics (Dare and Moore counties) in this reporting period, in addition to the regional expansion of mobile dental services in and around Mecklenburg County mentioned previously. New outcomes measures for both behavioral health and dental have been introduced into NCAFCC's 2023 Annual Survey to better define progress with expansion of these services.

3) Emergency department diversion savings - patients eligible for free and charitable clinic care will receive health care at free and charitable clinics rather than emergency departments.

In 2022, estimated hospital emergency department diversion savings was \$358,482,840 for NCAFCC Members. This estimate is based on averting one emergency department visit for each free and charitable clinic patient served according to the cost of a treat and release emergency department visit per the Sheps Center:

<https://www.shepscenter.unc.edu/data/nc-hospital-discharge-data/descriptive-statistics/>

As mentioned previously, publication of NCAFCC's 2023 Annual Report is expected in July 2024. Updated data will be provided for the above objectives at that time.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The expected results outlined in NCAFCC's Scope of Work were the following and are still underway:

1) Sustainability of Member organizations' ability to continue to provide free and charitable care in their communities.

NCAFCC Members are currently navigating changes in their operations related to Medicaid expansion. Many patients have become eligible for Medicaid and staff at Member clinics are supporting their transition to new medical homes, as most NCAFCC Members are not Medicaid providers. At the same time, they are engaging in new outreach to bring new individuals into their patient populations, focusing on those who are not eligible for Medicaid and remain uninsured after expansion. NCAFCC Members are now predominantly serving those who are uninsured at 139% - 250% (or 300%, in some cases) of FPL.

2) Growth in total active patient population for NCAFCC membership to impact as many as possible of the estimated 700,000 who will remain uninsured after Medicaid expansion in NC.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in July 2024.

3) Greater diversity in race/ethnicity of patients served to contribute to health equity efforts at member organizations.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in July 2024.

4) Improved health outcomes for diabetes/hypertension, as measured by annual diabetes and hypertension outcomes.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in July 2024.

5) Increased emergency department diversion savings.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in July 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

During the last reporting period, NCAFCC Members reported the following patient outcomes in their grant reporting:

Reporting Period	# of Members Reporting	Total # of Unduplicated Patients	Total # of Established Patients Seen	Total # of New Patients Seen
January 2024 (07/01/23 – 12/31/23)	47	53,861	40,274	10,805
Total				10,805

At this time, NCAFCC has received 57 grant agreements from our Members and 54 of these have final, executed agreements. We are projecting 60-64 Member organizations to engage in this directed grant.

Quarterly Grant Reporting Measures:

- 1) Active patient population (total number of unduplicated, uninsured and under-insured patients at the time of reporting): 53,861
- 2) Total number of established patients served since the beginning of the period of performance: 40,274
- 3) Total number of new patients served since the beginning of the period of performance: 10,805

Additionally, as mentioned previously, the 2023 Annual Survey will be released to Members on 2/1/24, so updates on these measures will be available in July 2024.

Measures reported on the NCAFCC Annual Survey Reports for 2023, 2024 and 2025 (reports will be available in July 2024, July 2025 and July 2026, respectively) on end of year reporting, to include:

- 1) Total patients served annually by race/ethnicity
- 2) Total annual medical/dental/behavioral health visits performed
- 3) Annual diabetes control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 4) Annual hypertension control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 5) Annual estimated emergency department diversion savings

The above-mentioned measures are currently pending the release of NCAFCC's 2023 Annual Report.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
		SFY 2023-2024
Amount of Appropriation	\$4,849,573.00	\$6,341,179.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$77,651.02	\$
Supplies and Materials Expenses (e.g., office supplies):	\$169.51	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$10,543.50	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Sub-Awards to NCAFCC Members	\$1,184,411.10	\$
Total Expenses:	\$1,272,775.13	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	\$4,849,573.00	\$6,341,179.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$181,096.56	\$
Supplies and Materials Expenses (e.g., office supplies):	\$991.21	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$1340.79	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$30,516.28	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,000.00	\$
Other Expenses (Specify): Sub-Awards to NCAFCC Members	\$1,184,411.10	\$
Total Expenses:	\$1,410,355.94	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Association of Free & Charitable Clinics, Inc. (NCAFCC)
Recipient Tax ID #	56-2062170
Project/Activity Title:	SL 2023-134 Directed Grant
Reporting Period (Quarter):	July 2024 (from 4/1/24 – 6/30/24)
Report Completion Date:	07/15/24
Preparer of This Report:	Allison Kelly

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No (Our members have reported for the July 2024 reporting period which covers the 4/1/24 - 6/30/24 period and NCAFCC is currently reviewing and approving reimbursements to members for this reporting. This aggregated information will be reported in NCAFCC's October 2024 report, just as we've reported April 2024 member expenses in this report.)

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCAFCC provided support to its 69 Member free and charitable clinics, enabling them to serve uninsured and underinsured patients across North Carolina. Highlights during this reporting period include further progress with launching our regional mobile dental program comprised of NCAFCC member clinic patients in and around the Charlotte-Mecklenburg area and surrounding counties. In this reporting period, we started serving regional clinic patients with dental services. The mobile dental unit visited Cook Community Clinic, Matthews Free Medical Clinic, Community Free Clinic. In the next reporting period, it will visit HealthReach Community Clinic, Hope Community Clinic of East Charlotte and hopefully also Fifth Street Ministries and Care Ring. Additionally, in May, NCAFCC hosted its first quarterly dental networking groups for all member clinics who are engaged in dental services now, or would like to be. In the May meeting, Amanda Belleville, Program Chair of Dental Assisting at Rowan-Cabarrus Community College shared about dental compliance factors, as well as how free and charitable clinics can partner with their local community college. Our September meeting is on the books and Dr. Saba Mokry, Assistant Professor at UNC Adams School of Dentistry will discuss providing oral health care with limited resources. The NCAFCC team is also working on several initiatives that align with our strategic objectives. Currently there are plans to evaluate access to free and charitable clinics through mobile health services for the uninsured and underserved in the 15 North Carolina counties where no free and charitable member clinics currently exist. Several funders have expressed interest in supporting free and charitable mobile expansion in the northern and northeastern section of the state for a number of counties where no free and charitable care currently exists. Additionally, NCAFCC's efforts to expand behavioral health regionally continue to develop as well. Specifically, we are exploring tele-psychiatry and tele-behavioral health services for regional expansion as well in the coming years. These regional efforts have potential for increased cost-efficiency through the sharing of services among clinics in each region. Our vision is to ensure that North Carolinians in all 100 counties of the state have access to free and charitable medical, dental, behavioral health, pharmacy and social services. Additionally, NCAFCC continues to provide significant support to its Members during Medicaid expansion. NCAFCC has not only extensively prepared Members leading up to expansion with resources and guidance, but also continue to support them through the transition, as they make decisions that will affect their operations, staff and volunteers in the years to come.

We are currently finalizing and preparing to publish NCAFCC's 2023 Annual Survey from our Members. We plan to publish NCAFCC's 2023 Annual Report in late July. This information will inform annual outcomes on this grant that will be reported in the October 2024 reporting period. Additionally, NCAFCC released a second quarterly survey to Members that will quantify the impact of Medicaid expansion upon our Members. We will continue to release these Medicaid expansion surveys quarterly throughout expansion and hope to include this information in future reports as well.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The objectives outlined in our Scope of Work were the following and which are still underway and will be updated in the October 2024 reporting period after the publication of the NCAFCC 2023 Annual Report in late July 2024:

1) Uninsured and underinsured patients in NC will have necessary medical, dental, pharmacy, behavioral/mental health and social services care provided at no cost or minimal cost.

As of the publication of NCAFCC's 2022 Annual Report in July 2023, NCAFCC Members served more than 80,090 uninsured and underserved patients across 87 of North Carolina's 100 counties, as compared to 82,480 patients in 2021 and 76,911 in 2020. Additionally, 199,743 total provider visits were conducted in 2022, representing an increase of 10,856 total visits over 2021. Improvement was made with diabetes outcomes in 2022, with 26.4% of patients in 2022 with a Hemoglobin A1c over 9.0% or no A1c performed, as compared to 29% in 2021 and 30.9% in 2020. Improvement was also made with hypertension outcomes in 2022 with 58.6% of patients in 2022 with blood pressure under 140/90 compared to 55.6% in 2021 and 55.3% in 2020. In summary, although the number of patients served in 2022 was 3% lower than 2021, Members reported higher provider visits in 2022 over 2021 and better outcomes for diabetes and hypertension overall, as compared to the last two years. The Total Value of Services to Community-At-Large (patients & others in the community) was \$347,321,434 and the Value of Services per Patient was \$3,535.36. For every \$1 spent, \$5.42 in healthcare services were provided. Finally, the Value of Prescription Medications provided to patients was \$189,462,861.

2) Regional expansion of integrated dental and behavioral/mental health care services within free and charitable clinics to better meet the needs of uninsured and underinsured patients across NC.

NCAFCC's 2022 Annual Report also showed that 34 Members provided behavioral/mental health services to patients and 16 provided dental services. Two new dental clinics have opened in rural member clinics (Dare and Moore counties) in this reporting period, in addition to the regional expansion of mobile dental services in and around Mecklenburg County mentioned previously. New outcomes measures for both behavioral health and dental have been introduced into NCAFCC's 2023 Annual Survey to better define progress with expansion of these services.

3) Emergency department diversion savings - patients eligible for free and charitable clinic care will receive health care at free and charitable clinics rather than emergency departments.

In 2022, estimated hospital emergency department diversion savings was \$358,482,840 for NCAFCC Members. This estimate is based on averting one emergency department visit for each free and charitable clinic patient served according to the cost of a treat and release emergency department visit per the Sheps Center: <https://www.shepscenter.unc.edu/data/nc-hospital-discharge-data/descriptive-statistics/>

As mentioned previously, publication of NCAFCC's 2023 Annual Report is expected in late July 2024 and will be reported in the October 2024 reporting period. Updated data will be provided for the above objectives at that time.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

The expected results outlined in NCAFCC's Scope of Work were the following and are still underway and will be updated in the October 2024 reporting period after the publication of the NCAFCC 2023 Annual Report in late July 2024::

1) Sustainability of Member organizations' ability to continue to provide free and charitable care in their communities.

NCAFCC Members are currently navigating changes in their operations related to Medicaid expansion. Many patients have become eligible for Medicaid and staff at Member clinics are supporting their transition to new medical homes, as most NCAFCC Members are not Medicaid providers. At the same time, they are engaging in new outreach to bring new individuals into their patient populations, focusing on those who are not eligible for Medicaid and remain uninsured after expansion. NCAFCC Members are now predominantly serving those who are uninsured at 139% - 250% (or 300%, in some cases) of FPL. We are seeing stabilization of patient volume at clinics over the last couple of months, as we understand Medicaid enrollment has nearly peaked.

2) Growth in total active patient population for NCAFCC membership to impact as many as possible of the estimated 700,000 who will remain uninsured after Medicaid expansion in NC.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in late July 2024.

3) Greater diversity in race/ethnicity of patients served to contribute to health equity efforts at member organizations.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in late July 2024.

4) Improved health outcomes for diabetes/hypertension, as measured by annual diabetes and hypertension outcomes.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in late July 2024.

5) Increased emergency department diversion savings.

This information will be more readily available once NCAFCC's 2023 Annual Report is published in late July 2024.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

During the last reporting period, NCAFCC Members reported the following patient outcomes in their grant reporting:

Reporting Period	# of Members Reporting	Total # of Unduplicated Patients	Total # of Established Patients Seen	Total # of New Patients Seen
January 2024 (07/01/23 – 12/31/23)	47	53,861	40,274	10,805
April 2024 (01/01/24 – 03/31/24)	54	61,417	34,965	5554
Total				16,359

At this time, NCAFCC has received 61 grant agreements from our Members and 58 of these have final, executed agreements. We are projecting 60-64 Member organizations to engage in this directed grant.

Quarterly Grant Reporting Measures:

- 1) Active patient population (total number of unduplicated, uninsured and under-insured patients at the time of reporting): 61,417
- 2) Total number of established patients served since the beginning of the period of performance: 75,239 (please note, this is not an unduplicated count)
- 3) Total number of new patients served since the beginning of the period of performance: 16,359

Additionally, as mentioned previously, the 2023 Annual Survey will be published in late July 2024, so updates on these measures will be available in the October 2024 reporting period.

Measures reported on the NCAFCC Annual Survey Reports for 2023, 2024 and 2025 (reports will be available in July 2024, July 2025 and July 2026, respectively) on end of year reporting, to include:

- 1) Total patients served annually by race/ethnicity
- 2) Total annual medical/dental/behavioral health visits performed
- 3) Annual diabetes control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 4) Annual hypertension control by race/ethnicity (if applicable to Member based on diagnosis and treatment, as defined in Annual Survey methodology)
- 5) Annual estimated emergency department diversion savings

The above-mentioned measures are currently pending the release of NCAFCC's 2023 Annual Report.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$4,849,573.00	\$6,341,179.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$83,966.08	\$
Supplies and Materials Expenses (e.g., office supplies):	\$8.79	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$239.86	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$10,842.48	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$0	\$
Other Expenses (Specify): Sub-Awards to NCAFCC Members	\$1,351,141.04	\$
Total Expenses:	\$1,446,198.25	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$4,849,573.00	\$6,341,179.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$265,062.64	\$
Supplies and Materials Expenses (e.g., office supplies):	\$1000.00	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$1580.65	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$41,358.76	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,000.00	\$
Other Expenses (Specify): Sub-Awards to NCAFCC Members	\$2,535,552.14	\$
Total Expenses:	\$2,856,554.19	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Coalition to End Homelessness
Recipient Tax ID #	55-2227722
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	July 1, 2023 – December 31, 2023
Report Completion Date:	March 9, 2024
Preparer of This Report:	YaKisha Cole

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Directed Grant funds allocated to NCCEH were utilized to address operational and administrative expenses related to our initiatives aimed at combating homelessness in North Carolina. We consistently offer technical assistance and training to our partner agencies/organizations and the remaining 11 CoCs, enabling them to access federal funds and develop cost-effective programs. This effort also ensures the efficient utilization of limited funding resources.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

NCCEH remains committed to its objective of reducing homelessness to a rare, brief, and non-recurring occurrence. We actively facilitate the exchange of best practices among CoCs and collaborate closely with The Data Center and the other 11 CoCs in North Carolina to gather, assess, and disseminate data effectively. Currently, we are preparing for the upcoming PIT/HIC counts in local communities and exploring methods to enhance the process for greater accuracy.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We are persistently addressing the tasks delineated in our Scope of Work, aiming for positive outcomes to be evident in April's report.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

The efforts we've invested in the past few months should be evident in the precision of the forthcoming PIT/HIC counts in January

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>	79,137.50	0.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 59,388.73	\$ 0.00
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,277.61	\$ 0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,092.61	\$ 0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,994.87	\$ 0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$ 0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,485.29	\$ 0.00
Other Expenses (Specify): website	\$ 898.39	\$ 0.00
Total Expenses:	\$ 79,137.50	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 59,388.73	\$ 0.00
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,277.61	\$ 0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,092.61	\$ 0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,994.87	\$ 0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$ 0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,485.29	\$ 0.00
Other Expenses (Specify): website	\$ 898.39	\$ 0
Total Expenses:	\$ 79,137.50	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Coalition to End Homelessness
Recipient Tax ID #	55-2227722
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	July 1, 2023 – December 31, 2023
Report Completion Date:	March 9, 2024
Preparer of This Report:	YaKisha Cole

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Directed Grant funds allocated to NCCEH were utilized to address operational and administrative expenses related to our initiatives aimed at combating homelessness in North Carolina. We consistently offer technical assistance and training to our partner agencies/organizations and the remaining 11 CoCs, enabling them to access federal funds and develop cost-effective programs. This effort also ensures the efficient utilization of limited funding resources.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

NCCEH remains committed to its objective of reducing homelessness to a rare, brief, and non-recurring occurrence. We actively facilitate the exchange of best practices among CoCs and collaborate closely with The Data Center and the other 11 CoCs in North Carolina to gather, assess, and disseminate data effectively. Currently, we are preparing for the upcoming PIT/HIC counts in local communities and exploring methods to enhance the process for greater accuracy.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We are persistently addressing the tasks delineated in our Scope of Work, aiming for positive outcomes to be evident in April's report.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

The efforts we've invested in the past few months should be evident in the precision of the forthcoming PIT/HIC counts in January

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>	79,137.50	0.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 59,388.73	\$ 0.00
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,277.61	\$ 0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,092.61	\$ 0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,994.87	\$ 0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$ 0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,485.29	\$ 0.00
Other Expenses (Specify): website	\$ 898.39	\$ 0.00
Total Expenses:	\$ 79,137.50	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 59,388.73	\$ 0.00
Supplies and Materials Expenses (e.g., office supplies):	\$ 1,277.61	\$ 0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 4,092.61	\$ 0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 8,994.87	\$ 0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$ 0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 4,485.29	\$ 0.00
Other Expenses (Specify): website	\$ 898.39	\$ 0
Total Expenses:	\$ 79,137.50	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Coalition to End Homelessness
Recipient Tax ID #	55-2227722
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	April 1, 2024 – June 30, 2024
Report Completion Date:	July 17, 2024
Preparer of This Report:	Latonya Agard

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, NCCEH has used funds from the Directed Grant to help cover the overhead and administrative expenses incurred in our effort to end homelessness in NC. Specifically, the grant has helped us cover personnel, contract, and fixed operational costs. In addition to regular overhead and administrative expenses, the NC BoS Team collaborated with the Data Center and direct providers to compile, submit, and analyze data from the January 2024 PIT Count.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

NCCEH's goal is to ensure that homelessness is rare, brief, and one-time only. For our work with the NC BoS CoC, that objective translates to increased funding, enhanced technical assistance, and continual training options for frontline agencies working to end homelessness in their local communities. NCCEH has made progress on our objectives by increasing staff engagement in the thirteen regions within the NC BoS CoC. During this quarter, the NC BoS Steering Committee met in person to review governance and representation. An engaged, knowledgeable, diverse Steering Committee is essential to the CoC's ability to operate equitably, efficiently, and effectively. The Data Center has continued to meet with other HMIS Implementations to discuss data quality, sharing, and analysis.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

NCCEH PIT data reflect an increase in unsheltered homelessness since 2023. While this is not the result we desired, we celebrate the improved effort throughout the NC BoS CoC to engage and reach our unsheltered neighbors. The data enhance our ability to make better decisions about funding priorities and projects in future competitions. However, our support of the Back@Home program administered by NCORR has helped to house families this quarter.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

The 2024 PIT Count for the NC BoS CoC revealed an increase in the total number of people experiencing homelessness. The most dramatic increase was in the number of people living unsheltered. While we know that the PIT count is akin to a Polaroid snapshot of a community, this increase reveals that more and more people are living in places not intended for human habitation.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>	\$49010.31	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$26,716.09	\$0.00
Supplies and Materials Expenses (e.g., office supplies):	\$13,19.79	\$0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$7,470.62	\$0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$10,073.20	\$0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$1,111.42	\$0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$2319.19	\$0.00
Other Expenses (Specify):	\$0.00	\$0.00
Total Expenses:	\$49,010.31	\$0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	\$158,275.00	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$99,957.51	\$0.00
Supplies and Materials Expenses (e.g., office supplies):	\$2,881.04	\$0.00
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$15,598.97	\$0.00
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$25,087.86	\$0.00
Property and Equipment Expenses (e.g., buildings and improvements):	\$1,111.42	\$0.00
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$12,739.81	\$0.00
Other Expenses (Specify):	\$898.39	\$0.00
Total Expenses:	\$158,275.00	\$0.000

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Housing Coalition
Recipient Tax ID #	58-1798953
Project/Activity Title:	Directed Grant – Bringing It Home Conference
Reporting Period (Quarter):	July 1, 2023-June 30, 2024
Report Completion Date:	8/1/24
Preparer of This Report:	Haley Solomon

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During the reporting period of July 1, 2023 to June 30, 2024, the NC Housing Coalition planned and hosted the 2024 Bringing It Home: Ending Homelessness in NC conference. More than 400 homelessness services professionals from across the state attended the two-day in-person event, which featured more than twenty sessions focused on improving homelessness services.

**2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project.
Have you accomplished any of your objectives?**

The 2024 Bringing It Home conference accomplished our objective to “strengthen organizational and service delivery capacity within the homeless and housing services arena throughout North Carolina.” 83% of post-conference survey respondents agreed or strongly agreed that the conference was useful to them professionally. 76% of respondents agreed or strongly agreed that the conference sessions would help them perform their job more effectively. Attendees also expressed the value of being able to network with other service providers in person for the first time since 2019.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

As expected in our Scope of Work, more than 400 conference attendees from homelessness services organizations across the state received training and resources from national and local experts.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

A total of 119 individuals, roughly 30% of conference attendees, completed the post-conference survey. The survey collected both measurable data and gave attendees the opportunity to provide additional feedback that we will use to improve future conferences.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$86,817.68	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$13,182.32	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$100,000.	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Oxford House, Inc.
Recipient Tax ID #	52-1582231
Project/Activity Title:	23-25 Biennium Directed Grant - Oxford House, Inc.
Reporting Period (Quarter):	7/1/23-9/30/23
Report Completion Date:	02/21/2024
Preparer of This Report:	Will Madison & Crystal Wood

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, our Grant Project has achieved notable progress in enhancing support for individuals recovering from Substance Use Disorder (SUD) in North Carolina. We've successfully maintained an information exchange with key stakeholders to match individuals with Oxford House vacancies, conducted educational outreach through monthly presentations, and improved our vacancy reporting system for better communication. The administration of start-up loans from the NC Revolving Loan Fund has supported the expansion of Oxford Houses, while our partnerships with educational institutions have been strengthened through targeted presentations and collaborations. We've also focused on quality assurance through regular training and house visits, alongside fostering peer support and personal growth among residents, contributing significantly to our mission of building a sustainable recovery infrastructure.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

In our continuous effort to enhance the Oxford House Model™ in North Carolina, we have made significant advancements in line with our strategic objectives and goals. Our efforts this period have been multifaceted, focusing on strengthening our support network, optimizing our operations, and expanding our partnerships. Below are the highlights of our progress:

Enhanced Information Exchange and Community Integration:**

We have successfully implemented and are maintaining a robust information exchange system involving key stakeholders such as DHHS MH/DD/SAS, LME/MCOs, treatment providers, and the judicial system, among others. This initiative has been pivotal in matching recovering individuals with suitable Oxford House vacancies, thereby facilitating smoother transitions for those seeking recovery home residences.

Educational Outreach and Support System Improvements:**

- Monthly statewide discussion groups and presentations have been held consistently, targeting individuals nearing treatment completion. These sessions have been instrumental in informing them about the benefits of recovery homes, aligning with Objective 1.3.

- Significant enhancements have been made to the vacancy reporting system, ensuring its efficiency and effectiveness in bridging communication between Oxford House, prospective residents, and treatment providers, as per Objective 1.4.

Administration of Start-up Loans:**

- In accordance with Goal 2.0, we have diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses.

Development of Educational Partnerships:**

- Our outreach efforts have included over twelve presentations to collegiate recovery programs and campuses across NC, showcasing the benefits of Oxford House residency during academic pursuits, meeting Objective 3.1.

- Collaborative efforts have been extended to various services and educational institutions, fostering a comprehensive support ecosystem for our residents.

Quality Assurance and Network Maintenance:**

- Staff training on the standard system of operations for Oxford Houses across NC has been conducted, ensuring the effective management of these homes.

- Consistent with Objective 4.2, our regional manager and outreach staff have conducted quarterly and unannounced visits to various houses to ensure compliance with Oxford House policies and procedures.

Peer Support and Personal Growth:**

- Our staff has made significant strides in training Oxford House residents for self-management in line with the Oxford House Model. We've conducted 7 targeted training sessions across the state in Q1, engaging 153 members in learning about officer roles, meeting management, and community service.

Beyond these sessions, our staff continues to offer individualized support during house visits, providing personalized guidance that's crucial but not captured in our training count. This ongoing, one-on-one training ensures all residents are equipped for their roles, contributing to the Oxford House community's strength and resilience.

As we move forward, we remain dedicated to both structured and personalized training approaches, ensuring every Oxford House member is supported in their journey towards autonomous operation and community involvement.

- Initiatives to promote personal growth and community engagement among Oxford House residents have been strengthened, fostering a supportive and active recovery community.

In summary, our efforts during the reporting period have significantly contributed to the fortification and expansion of the Oxford House Model™ in North Carolina. Through strategic partnerships, operational enhancements, and a focus on community integration and personal growth, we are steadfast in our commitment to providing a solid foundation for individuals in recovery.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Oxford House Staff has connected and worked with various landlords, property management groups and realty agencies to locate and secure additional Oxford Houses.
- Oxford House Staff continues to maintain partnerships with DHHS, local treatment providers, city jails and federal prisons to link recovering individuals to Oxford Houses and holds monthly or biweekly group discussion/presentations to local treatment providers and clients. Oxford House Staff participated and facilitated five (5) presentations with treatment providers and clients.
- Oxford House Staff monitors and maintains the internal Oxford House Vacancy System for accuracy, to effectively connect referral sources and clients to available beds through the state network of Oxford Houses.
- Oxford House Inc. has diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses and reports regularly on the status of repayment and performance of the fund.
- Oxford House Staff has conducted one (1) of presentations/discussions with collegiate recovery programs and continues to partner with Colleges/Universities to link students with SUD to a safe supportive housing option in close proximity to the college campus.
- University of NC, Chapel Hill NC
- Oxford House continues to provide safe and supportive housing for a total of 2380 beds in the State of North Carolina. Under the state directed grant, we are capable of serving 361 individuals.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

OHI shall establish a minimum of six (6) new Oxford Houses by June 30, 2025 (three (3) per 12-month period:

- Oxford House Staff have continue to work with various local landlords, property management groups, and realty agencies to secure additional Oxford Houses across the state.

The average annual occupancy rate in each Recovery House must be at least 80%.

- Occupancy rate reported annually.

OHI, under this grant, shall maintain up to two (2) full-time staff;

- Oxford House continues to maintain two (2) full-time staff.

Administer loans from the NC Revolving Loan Fund (RLF) to North Carolina Oxford Houses occupied by no less than six individuals in recovery per home. Priority for housing admission must be given to individuals who have completed a treatment program and individuals continuing participation in outpatient, recovery support services, and opioid treatment services.

- Oxford House Inc. has made 3 repayments, paid to the division with report in this reporting period.

OHI maintains the Oxford House of North Carolina website for current house vacancies and house directory, manual, forms, chapter updates application, and eligibility information. Oxford House staff tracks the Monthly Housing Activity and provides a Report that includes data from each new house regarding the number of applications, number of beds available,

number of admissions, and number of residents leaving the houses and the reasons for leaving a recurrence of use, voluntary or other causes.

- Quarterly Status Reports and Quarterly Payment Reports are due by the 15th day following the end of the quarter. Annual Financial Audit due six months following the end of their fiscal audit year. Annual Resident Profile Survey completed and reported to DMH/DD/SAS by November 30th, 2024,2025.

- Oxford House Inc. has and continues to report timely, the Quarterly Status Reports and Quarterly Payment Reports, Audit and Resident Profile are reported Annually.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 25,125.43	\$
Supplies and Materials Expenses (e.g., office supplies):	\$722.56	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$12,141.44	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 403.73	\$
Other Expenses (Specify): Indirect Costs	\$3,819.17	\$
Total Expenses:	\$ 42,212.33	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 25,125.43	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 722.56	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 12,141.44	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 403.73	\$
Other Expenses (Specify): Indirect Costs	\$ 3,819.17	\$
Total Expenses:	\$ 42,212.33	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	Oxford House, Inc.
Recipient Tax ID #	52-1582231
Project/Activity Title:	23-25 Biennium Directed Grant - Oxford House, Inc.
Reporting Period (Quarter):	10/1/23-12/31/23
Report Completion Date:	02/20/2024
Preparer of This Report:	Will Madison, Crystal Wood

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, our Grant Project has achieved notable progress in enhancing support for individuals recovering from Substance Use Disorder (SUD) in North Carolina. We've successfully maintained an information exchange with key stakeholders to match individuals with Oxford House vacancies, conducted educational outreach through monthly presentations, and improved our vacancy reporting system for better communication. The administration of start-up loans from the NC Revolving Loan Fund has supported the expansion of Oxford Houses, while our partnerships with educational institutions have been strengthened through targeted presentations and collaborations. We've also focused on quality assurance through regular training and house visits, alongside fostering peer support and personal growth among residents, contributing significantly to our mission of building a sustainable recovery infrastructure.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

In our continuous effort to enhance the Oxford House Model™ in North Carolina, we have made significant advancements in line with our strategic objectives and goals. Our efforts this period have been multifaceted, focusing on strengthening our support network, optimizing our operations, and expanding our partnerships. Below are the highlights of our progress:

Enhanced Information Exchange and Community Integration:**

We have successfully implemented and are maintaining a robust information exchange system involving key stakeholders such as DHHS MH/DD/SAS, LME/MCOs, treatment providers, and the judicial system, among others. This initiative has been pivotal in matching recovering individuals with suitable Oxford House vacancies, thereby facilitating smoother transitions for those seeking recovery home residences.

Educational Outreach and Support System Improvements:**

- Monthly statewide discussion groups and presentations have been held consistently, targeting individuals nearing treatment completion. These sessions have been instrumental in informing them about the benefits of recovery homes, aligning with Objective 1.3.

- Significant enhancements have been made to the vacancy reporting system, ensuring its efficiency and effectiveness in bridging communication between Oxford House, prospective residents, and treatment providers, as per Objective 1.4.

Administration of Start-up Loans:**

- In accordance with Goal 2.0, we have diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses.

Development of Educational Partnerships:**

- Our outreach efforts have included over twelve presentations to collegiate recovery programs and campuses across NC, showcasing the benefits of Oxford House residency during academic pursuits, meeting Objective 3.1.

- Collaborative efforts have been extended to various services and educational institutions, fostering a comprehensive support ecosystem for our residents.

Quality Assurance and Network Maintenance:**

- Staff training on the standard system of operations for Oxford Houses across NC has been conducted, ensuring the effective management of these homes.

- Consistent with Objective 4.2, our regional manager and outreach staff have conducted quarterly and unannounced visits to various houses to ensure compliance with Oxford House policies and procedures.

Peer Support and Personal Growth:**

- Our outreach efforts have made significant strides in training Oxford House residents for self-management in line with the Oxford House Model. We've conducted 10 targeted training sessions across the state in Q2, engaging 253 members in learning about officer roles, meeting management, and community service.

Beyond these sessions, our staff continues to offer individualized support during house visits, providing personalized guidance that's crucial but not captured in our training count. This ongoing, one-on-one training ensures all residents are equipped for their roles, contributing to the Oxford House community's strength and resilience.

- Initiatives to promote personal growth and community engagement among Oxford House residents have been strengthened, fostering a supportive and active recovery community.

In summary, our efforts during this reporting period have significantly contributed to the fortification and expansion of the Oxford House Model™ in North Carolina. Through strategic partnerships, operational enhancements, and a focus on community integration and personal growth, we are steadfast in our commitment to providing a solid foundation for individuals in recovery.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Oxford House Staff has connected and worked with various landlords, property management groups and realty agencies to locate and secure additional Oxford Houses.
- Oxford House Staff continues to maintain partnerships with DHHS, local treatment providers, city jails and federal prisons to link recovering individuals to Oxford Houses and holds monthly or biweekly group discussion/presentations to local treatment providers and clients. Oxford House Staff participated and facilitated five (5) presentations with treatment providers and clients.
- Oxford House Staff monitors and maintains the internal Oxford House Vacancy System for accuracy, to effectively connect referral sources and clients to available beds through the state network of Oxford Houses.
- Oxford House Inc. has diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses and reports regularly on the status of repayment and performance of the fund.
- Oxford House Staff has conducted one (1) of presentations/discussions with collegiate recovery programs and continues to partner with Colleges/Universities to link students with SUD to a safe supportive housing option in close proximity to the college campus.
- University of NC, Chapel Hill NC
- Oxford House continues to provide safe and supportive housing for a total of 2380 beds in the State of North Carolina. Under the state directed grant, we are capable of serving 363 individuals.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

OHI shall establish a minimum of six (6) new Oxford Houses by June 30, 2025 (three (3) per 12-month period:

- Oxford House Staff have continue to work with various local landlords, property management groups, and realty agencies to secure additional Oxford Houses across the state.

The average annual occupancy rate in each Recovery House must be at least 80%.

- Occupancy rate reported annually.

OHI, under this grant, shall maintain up to two (2) full-time staff;

- Oxford House continues to maintain two (2) full-time staff.

Administer loans from the NC Revolving Loan Fund (RLF) to North Carolina Oxford Houses occupied by no less than six individuals in recovery per home. Priority for housing admission must be given to individuals who have completed a treatment program and individuals continuing participation in outpatient, recovery support services, and opioid treatment services.

- Oxford House Inc. has made 3 repayments, paid to the division with report in this reporting period.

OHI maintains the Oxford House of North Carolina website for current house vacancies and house directory, manual, forms, chapter updates application, and eligibility information. Oxford House staff tracks the Monthly Housing Activity and provides a Report that includes data from each new house regarding the number of applications, number of beds available, number of admissions, and number of residents leaving the houses and the reasons for leaving a recurrence of use, voluntary or other causes.

- Quarterly Status Reports and Quarterly Payment Reports are due by the 15th day following the end of the quarter. Annual Financial Audit due six months following the end of their fiscal audit year. Annual Resident Profile Survey completed and reported to DMH/DD/SAS by November 30th, 2024,2025.

- Oxford House Inc. has and continues to report timely, the Quarterly Status Reports and Quarterly Payment Reports, Audit and Resident Profile are reported Annually

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 26,980.83	\$
Supplies and Materials Expenses (e.g., office supplies):	\$473.25	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$11,023.93	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 0.00	\$
Other Expenses (Specify):	\$3,777.22	\$
Total Expenses:	\$ 42,255.23	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 52,106.26	\$
Supplies and Materials Expenses (e.g., office supplies):	\$1,195.81	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$23,165.37	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 403.73	\$
Other Expenses (Specify): Indirect Costs	\$7,596.39	\$
Total Expenses:	\$ 84,467.56	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Oxford House, Inc.
Recipient Tax ID #	52-1582231
Project/Activity Title:	23-25 Biennium Directed Grant - Oxford House, Inc.
Reporting Period (Quarter):	1/1/24-3/31/24
Report Completion Date:	04/15/2024
Preparer of This Report:	Will Madison, Crystal Wood

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During this reporting period, our Grant Project has achieved notable progress in enhancing support for individuals recovering from Substance Use Disorder (SUD) in North Carolina. We've successfully maintained an information exchange with key stakeholders to match individuals with Oxford House vacancies, conducted educational outreach through monthly presentations, and improved our vacancy reporting system for better communication. The administration of start-up loans from the NC Revolving Loan Fund has supported the expansion of Oxford Houses, while our partnerships with educational institutions have been strengthened through targeted presentations and collaborations. We've also focused on quality assurance through regular training and house visits, alongside fostering peer support and personal growth among residents, contributing significantly to our mission of building a sustainable recovery infrastructure.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

In our continuous effort to enhance the Oxford House Model™ in North Carolina, we have made significant advancements in line with our strategic objectives and goals. Our efforts this period have been multifaceted, focusing on strengthening our support network, optimizing our operations, and expanding our partnerships. Below are the highlights of our progress:

Enhanced Information Exchange and Community Integration:**

We have successfully implemented and are maintaining a robust information exchange system involving key stakeholders such as DHHS MH/DD/SAS, LME/MCOs, treatment providers, and the judicial system, among others. This initiative has been pivotal in matching recovering individuals with suitable Oxford House vacancies, thereby facilitating smoother transitions for those seeking recovery home residences.

Educational Outreach and Support System Improvements:**

- Monthly statewide discussion groups and presentations have been held consistently, targeting individuals nearing treatment completion. These sessions have been instrumental in informing them about the benefits of recovery homes, aligning with Objective 1.3.

- Significant enhancements have been made to the vacancy reporting system, ensuring its efficiency and effectiveness in bridging communication between Oxford House, prospective residents, and treatment providers, as per Objective 1.4.

Administration of Start-up Loans:**

- In accordance with Goal 2.0, we have diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses.

Development of Educational Partnerships:**

- Our outreach efforts have included over twelve presentations to collegiate recovery programs and campuses across NC, showcasing the benefits of Oxford House residency during academic pursuits, meeting Objective 3.1.

- Collaborative efforts have been extended to various services and educational institutions, fostering a comprehensive support ecosystem for our residents.

Quality Assurance and Network Maintenance:**

- Staff training on the standard system of operations for Oxford Houses across NC has been conducted, ensuring the effective management of these homes.

- Consistent with Objective 4.2, our regional manager and outreach staff have conducted quarterly and unannounced visits to various houses to ensure compliance with Oxford House policies and procedures.

Peer Support and Personal Growth:

- Our staff has made significant strides in training Oxford House residents for self-management in line with the Oxford House Model. We've conducted 8 targeted training sessions across the state in Q3, engaging 229 members in learning about officer roles,

meeting management, and community service.

Beyond these sessions, our staff continues to offer individualized support during house visits, providing personalized guidance that's crucial but not captured in our training count. This ongoing, one-on-one training ensures all residents are equipped for their roles, contributing to the Oxford House community's strength and resilience.

- Initiatives to promote personal growth and community engagement among Oxford House residents have been strengthened, fostering a supportive and active recovery community.

In summary, our efforts during this reporting period have significantly contributed to the fortification and expansion of the Oxford House Model™ in North Carolina. Through strategic partnerships, operational enhancements, and a focus on community integration and personal growth, we are steadfast in our commitment to providing a solid foundation for individuals in recovery.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Oxford House Staff has connected and worked with various landlords, property management groups and realty agencies to locate and secure additional Oxford Houses.
- Oxford House Staff continues to maintain partnerships with DHHS, local treatment providers, city jails and federal prisons to link recovering individuals to Oxford Houses and holds monthly or biweekly group discussion/presentations to local treatment providers and clients. Oxford House Staff participated and facilitated seven (7) presentations with treatment providers and clients.
- Oxford House Staff monitors and maintains the internal Oxford House Vacancy System for accuracy, to effectively connect referral sources and clients to available beds through the state network of Oxford Houses.
- Oxford House Inc. has diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses and reports regularly on the status of repayment and performance of the fund.
- Oxford House Staff has conducted three (3) of presentations/discussions with collegiate recovery programs and continues to partner with Colleges/Universities to link students with SUD to a safe supportive housing option in close proximity to the college campus.
- High Point University - High Point, NC
- North Carolina Central University - Durham, NC
- Methodist University - Fayetteville, NC
- Oxford House continues to provide safe and supportive housing for a total of 2432 beds in the State of North Carolina. Under the state directed grant, we are capable of serving 360 individuals.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

OHI shall establish a minimum of six (6) new Oxford Houses by June 30, 2025 (three (3) per 12-month period):

- Oxford House Staff have continue to work with various local landlords, property management groups, and realty agencies to secure additional Oxford Houses across the state. In Q3 Oxford House Staff successfully established two (2) new Oxford Houses, one (1) in Durham NC and one (1) in Asheville NC.

The average annual occupancy rate in each Recovery House must be at least 80%.

- Occupancy rate reported annually.

OHI, under this grant, shall maintain up to two (2) full-time staff;

- Oxford House continues to maintain two (2) full-time staff.

Administer loans from the NC Revolving Loan Fund (RLF) to North Carolina Oxford Houses occupied by no less than six individuals in recovery per home. Priority for housing admission must be given to individuals who have completed a treatment program and individuals continuing participation in outpatient, recovery support services, and opioid treatment services. In Q3, Oxford House administered one (1) loan from the NC Revolving Loan Fund (FLF) to the two (2) newly established Oxford Houses.

- Oxford House Inc. has made 3 repayments, paid to the division with report in this reporting period.

OHI maintains the Oxford House of North Carolina website for current house vacancies and house directory, manual, forms, chapter updates application, and eligibility information. Oxford House staff tracks the Monthly Housing Activity and provides a Report that includes data from each new house regarding the number of applications, number of beds available, number of admissions, and number of residents leaving the houses and the reasons for leaving a recurrence of use, voluntary or other causes.

- Quarterly Status Reports and Quarterly Payment Reports are due by the 15th day following the end of the quarter. Annual Financial Audit due six months following the end of their fiscal audit year. Annual Resident Profile Survey completed and reported to DMH/DD/SAS by November 30th, 2024,2025.

- Oxford House Inc. has and continues to report timely, the Quarterly Status Reports and Quarterly Payment Reports, Audit and Resident Profile are reported Annually

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 27,635.87	\$
Supplies and Materials Expenses (e.g., office supplies):	\$386.70	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$10,631.76	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 0.00	\$
Other Expenses (Specify):	\$3,937.21	\$
Total Expenses:	\$42,591.54	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 79,742.13	\$
Supplies and Materials Expenses (e.g., office supplies):	\$1,582.51	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$33,797.13	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 403.73	\$
Other Expenses (Specify): Indirect Costs	\$11,533.60	\$
Total Expenses:	\$127,059.10	\$ 0.00

If there are any questions, please contact the Contract Administrator.

DocuSigned by:

Angela Harper-King

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Contract Administrator

07/16/24 | 10:30 AM EDT

QUARTERLY STATUS REPORT**Please use this reporting template for each of the quarterly reports**

Recipient Name:	Oxford House, Inc.
Recipient Tax ID #	52-1582231
Project/Activity Title:	23-25 Biennium Directed Grant - Oxford House, Inc.
Reporting Period (Quarter):	4/1/24-6/30/24
Report Completion Date:	07/15/2024
Preparer of This Report:	Will Madison, Crystal Wood

Were grant funds expended during this reporting period? Yes NoDo you certify that all expenses to date have been submitted for this grant? Yes NoDo you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No**1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.**

During this reporting period, our Grant Project has continues to achieved notable progress in enhancing support for individuals recovering from Substance Use Disorder (SUD) in North Carolina. We've successfully maintained and elevated an information exchange with key stakeholders to match individuals with Oxford House vacancies, conducted educational outreach through monthly presentations, and improved our vacancy reporting system for better communication. The administration of start-up loans from the NC Revolving Loan Fund has supported the expansion of Oxford Houses, while our partnerships with educational institutions have been strengthened through targeted presentations and collaborations. We've also focused on quality assurance through regular training and house visits, alongside fostering peer support and personal growth among residents, contributing significantly to our mission of building a sustainable recovery infrastructure.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

In our continuous effort to enhance the Oxford House Model™ in North Carolina, we have made significant advancements in line with our strategic objectives and goals. Our efforts this period have been multifaceted, focusing on strengthening our support network, optimizing our operations, and expanding our partnerships. Below are the highlights of our progress:

Enhanced Information Exchange and Community Integration:**

We have successfully implemented and are maintaining a robust information exchange system involving key stakeholders such as DHHS MH/DD/SAS, LME/MCOs, treatment providers, and the judicial system, among others. This initiative has been pivotal in matching recovering individuals with suitable Oxford House vacancies, thereby facilitating smoother transitions for those seeking recovery home residences.

Educational Outreach and Support System Improvements:**

- Monthly statewide discussion groups and presentations have been held consistently, targeting individuals nearing treatment completion. These sessions have been instrumental in informing them about the benefits of recovery homes, aligning with Objective 1.3.

- Significant enhancements have been made to the vacancy reporting system, ensuring its efficiency and effectiveness in bridging communication between Oxford House, prospective residents, and treatment providers, as per Objective 1.4.

Administration of Start-up Loans:**

- In accordance with Goal 2.0, we have diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses.

Development of Educational Partnerships:**

- Our outreach efforts have included over twelve presentations to collegiate recovery programs and campuses across NC, showcasing the benefits of Oxford House residency during academic pursuits, meeting Objective 3.1.

- Collaborative efforts have been extended to various services and educational institutions, fostering a comprehensive support ecosystem for our residents.

Quality Assurance and Network Maintenance:**

- Staff training on the standard system of operations for Oxford Houses across NC has been conducted, ensuring the effective management of these homes.

- Consistent with Objective 4.2, our regional manager and outreach staff have conducted quarterly and unannounced visits to various houses to ensure compliance with Oxford House policies and procedures.

Personnel Training and Personal Growth:

- Our grant project has made significant strides in training Oxford House residents for self-management in line with the Oxford House Model. We've conducted 7 targeted training sessions across the state in Q4, engaging 218 members in learning about officer roles,

meeting management, and community service.

Beyond these sessions, our staff continues to offer individualized support during house visits, providing personalized guidance that's crucial but not captured in our training count. This ongoing, one-on-one training ensures all residents are equipped for their roles, contributing to the Oxford House community's strength and resilience.

- Initiatives to promote personal growth and community engagement among Oxford House residents have been strengthened, fostering a supportive and active recovery community.

In summary, our efforts during this reporting period have significantly contributed to the fortification and expansion of the Oxford House Model™ in North Carolina. Through strategic partnerships, operational enhancements, and a focus on community integration and personal growth, we are steadfast in our commitment to providing a solid foundation for individuals in recovery.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- Oxford House Staff has connected and worked with various landlords, property management groups and realty agencies to locate and secure additional Oxford Houses.
- Oxford House Staff continues to maintain partnerships with DHHS, local treatment providers, city jails and federal prisons to link recovering individuals to Oxford Houses and holds monthly or biweekly group discussion/presentations to local treatment providers and clients. Oxford House Staff participated and facilitated eight (8) presentations with treatment providers and clients.
- Oxford House Staff monitors and maintains the internal Oxford House Vacancy System for accuracy, to effectively connect referral sources and clients to available beds through the state network of Oxford Houses.
- Oxford House Inc. has diligently administered the application, administration, and repayment processes for start-up loans from the North Carolina Revolving Loan Fund (RLF), supporting eligible groups and facilitating the expansion of Oxford Houses and reports regularly on the status of repayment and performance of the fund.
- Oxford House Staff has conducted two (2) of presentations/discussions with collegiate recovery programs and continues to partner with Colleges/Universities to link students with SUD to a safe supportive housing option in close proximity to the college campus.
- East Carolina University - Greenville, NC
- Nash Community College - Rocky Mount, NC
- University of North Carolina Greensboro- Greensboro, NC
- University of North Carolina- Chapel Hill, NC

In addition to the NC collegiate programs, Oxford House Inc, sent 2 NC Staff to the ARHE conference in San Diego California

- Oxford House continues to provide safe and supportive housing for a total of 2444 beds in the State of North Carolina. Under the state directed grant, we are capable of serving 368 individuals.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

OHI shall establish a minimum of six (6) new Oxford Houses by June 30, 2025 (three (3) per 12-month period:

- Oxford House Staff have continue to work with various local landlords, property management groups, and realty agencies to secure additional Oxford Houses across the state. In Q4 Oxford House Staff successfully established one (1) new Oxford House in Fayetteville, NC in addition to (1) Durham, NC and (1)Asheville NC.

The average annual occupancy rate in each Recovery House must be at least 80%.

- Occupancy rate reported annually.

OHI, under this grant, shall maintain up to two (2) full-time staff;

- Oxford House continues to maintain two (2) full-time staff.

Administer loans from the NC Revolving Loan Fund (RLF) to North Carolina Oxford Houses occupied by no less than six individuals in recovery per home. Priority for housing admission must be given to individuals who have completed a treatment program and individuals continuing participation in outpatient, recovery support services, and opioid treatment services. In Q4, Oxford House administered one (1) new loan from the NC Revolving Loan Fund (FLF) to the one (1) newly established Oxford House.

- Oxford House Inc. has made 3 repayments, paid to the division with report in this reporting period.

OHI maintains the Oxford House of North Carolina website for current house vacancies and house directory, manual, forms, chapter updates application, and eligibility information. Oxford House staff tracks the Monthly Housing Activity and provides a Report that includes data from each new house regarding the number of applications, number of beds available, number of admissions, and number of residents leaving the houses and the reasons for leaving a recurrence of use, voluntary or other causes.

- Quarterly Status Reports and Quarterly Payment Reports are due by the 15th day following the end of the quarter. Annual Financial Audit due six months following the end of their fiscal audit year. Annual Resident Profile Survey completed and reported to DMH/DD/SAS by November 30th, 2024,2025.

- Oxford House Inc. has and continues to report timely, the Quarterly Status Reports and Quarterly Payment Reports, Audit and Resident Profile are reported Annually

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<u>Amount of Appropriation</u>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,167.87	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 2,932.94	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 14,042.87	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,096.27	\$
Other Expenses (Specify):	\$ 5,542.95	\$
Total Expenses:	\$ 60,782.90	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 115,910.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$ 4,515.45	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 47,840.00	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 0.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$ 2,500.00	\$
Other Expenses (Specify): Indirect Costs	\$ 17,076.55	\$
Total Expenses:	\$ 187,842.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	National Society to Prevent Blindness – North Carolina Affiliate, Inc. (Prevent Blindness North Carolina)
Recipient Tax ID #	56-6088141
Project/Activity Title:	Vision Screening Training and Certification program to make available mass vision screenings in the NC Public Schools
Reporting Period (Quarter):	July 1, 2023 – September 30, 2023 REVISED
Report Completion Date:	January 15, 2024
Preparer of This Report:	A. Edwin Jeffords, Jr. – President & CEO

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes (Through Sept 30, 2023) No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Asynchronous and in person trainings to screen school-age children have been offered to public and charter schools. In partnership with school nurses PBNC identified new and existing school staff and volunteer screeners needing training. In-person / on-site trainings have been scheduled at a time, date, and location convenient to staff and volunteers. Participants received a manual and best-practice vision screening charts and were required to pass a written test and demonstration of skills. Those who passed both components were certified for 2 years. PBNC staff consulted with school nurses to mitigate barriers to implementing mass screening programs. Throughout the year referred children in financial need will continue to have access to three PBNC administered voucher applications through a single online application and database.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The purpose of this contract is to provide a statewide evidence-based, age-appropriate training and certification of vision screeners across North Carolina in all 100 counties who conduct mass and individual vision screening for children of all ages in NC public and public charter schools.

The program has enabled schools and school systems to:

- provide students with access to free vision screenings in convenient locations
- accurately detect and identify suspected vision disorders at the earliest stage possible
- appropriately refer children to an eye doctor for diagnosis and treatment
- incorporate educational materials promoting health-related behaviors
- offer timely and continued follow-up for those who are referred for potential problems
- mitigate financial barriers to care by providing access to PBNC vouchers for eye exams and glasses

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

To date PBNC has:

- certified approximately 33% of the goal to train 3,000 unduplicated vision screeners
- reached participants in 65 counties of the goal to serve all 100 counties over a two-year period
- 75% of all participants trained in person.
- provided screening materials and charts to all participants needing new materials to conduct screenings
- provided an online Resource Guide outlining follow-up resources for free or low-cost eye care
- offered access to vision care through PBNC voucher programs for financially needy children
- tracked data on number of counties served and the number of screeners trained per county to date
- a survey requesting program testimonials and child success stories will be released to school nurses in the second half of the school year .
- Data on the number of children screened and referred will be available to PBNC via the State School Health Nurse Consultant in June 2024. After DHHS collects the vision screening data, PBNC will work with consultants and nurses to review data consistency and accuracy.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- 1,000 screeners trained and certified to date
- 58 counties served

1. Alexander
2. Ashe
3. Bladen
4. Buncombe
5. Caldwell
6. Carteret
7. Catawba
8. Chatham
9. Clay
10. Craven
11. Cumberland
12. Currituck
13. Duplin
14. Durham
15. Edgecombe
16. Gaston
17. Greene
18. Guilford
19. Halifax
20. Harnett
21. Henderson
22. Hoke
23. Hyde
24. Iredell
25. Johnston
26. Jones
27. Lee
28. Lenoir
29. Lincoln
30. Madison
31. Martin
32. Mecklenburg
33. Montgomery
34. Moore
35. Nash
36. New Hanover
37. Onslow
38. Orange
39. Pamlico
40. Pitt
41. Primary Care Provider
42. Randolph
43. Richmond
44. Rockingham
45. Rowan
46. Sampson
47. Stokes
48. Surry
49. Transylvania
50. Union
51. Vance
52. Wake
53. Washington
54. Watauga
55. Wayne

56. Wilkes
57. Yadkin
58. Yancey

- 100% of local health departments and local education agencies have access electronically to the Vision Resource Guides outlining follow-up resources for obtaining eye care.
- 174 vouchers for free eye care that were offered to 100% of eligible children who have been identified as needing eye care but cannot afford such care.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$88,190.73	\$
Supplies and Materials Expenses (e.g., office supplies):	\$15,195.71	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$10,393.66	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$16,550.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$300.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$130,630.10	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$88,190.73	\$
Supplies and Materials Expenses (e.g., office supplies):	\$15,195.71	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$10,393.66	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$16,550.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$300.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$130,630.10	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	National Society to Prevent Blindness – North Carolina Affiliate, Inc. (Prevent Blindness North Carolina)
Recipient Tax ID #	56-6088141
Project/Activity Title:	Vision Screening Training and Certification program to make available mass vision screenings in the NC Public Schools
Reporting Period (Quarter):	October 1, 2023 – December 31, 2023 (Quarter 2) REVISED
Report Completion Date:	January 15, 2024
Preparer of This Report:	A. Edwin Jeffords, Jr. – President & CEO

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes (Through Dec 31, 2023) No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Asynchronous and in person trainings to screen school-age children have been offered to public and charter schools. In partnership with school nurses PBNC identified new and existing school staff and volunteer screeners needing training. In-person / on-site trainings have been scheduled at a time, date, and location convenient to staff and volunteers. Participants received a manual and best-practice vision screening charts and were required to pass a written test and demonstration of skills. Those who passed both components were certified for 2 years. PBNC staff consulted with school nurses to mitigate barriers to implementing mass screening programs. Throughout the year referred children in financial need will continue to have access to three PBNC administered voucher applications through a single online application and database.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The purpose of this contract is to provide a statewide evidence-based, age-appropriate training and certification of vision screeners across North Carolina in all 100 counties who conduct mass and individual vision screening for children of all ages in NC public and public charter schools.

The program has enabled schools and school systems to:

- provide students with access to free vision screenings in convenient locations
- accurately detect and identify suspected vision disorders at the earliest stage possible
- appropriately refer children to an eye doctor for diagnosis and treatment
- incorporate educational materials promoting health-related behaviors
- offer timely and continued follow-up for those who are referred for potential problems
- mitigate financial barriers to care by providing access to PBNC vouchers for eye exams and glasses

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

To date PBNC has:

- certified approximately 68% of the goal to train 3,000 unduplicated vision screeners
- reached participants in 99 counties of the goal to serve all 100 counties over a two-year period
- 73% of all participants trained in person.
- provided screening materials and charts to all participants needing new materials to conduct screenings
- provided an online Resource Guide outlining follow-up resources for free or low-cost eye care
- offered access to vision care through PBNC voucher programs for financially needy children
- tracked data on number of counties served and the number of screeners trained per county to date
- a survey requesting program testimonials and child success stories will be released to school nurses in the second half of the school year
- Data on the number of children screened and referred will be available to PBNC via the State School Health Nurse Consultant in June 2024. After DHHS collects the vision screening data, PBNC will work with consultants and nurses to review data consistency and accuracy.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- 2,052 screeners trained and certified to date
- 86 counties served

1. Alamance
2. Alexander
3. Alleghany
4. Anson
5. Ashe
6. Avery
7. Beaufort
8. Bertie
9. Bladen
10. Brunswick
11. Buncombe
12. Burke
13. Cabarrus
14. Caldwell
15. Camden
16. Carteret
17. Caswell
18. Catawba
19. Chatham
20. Cherokee
21. Chowan
22. Clay
23. Columbus
24. Craven
25. Cumberland
26. Currituck
27. Dare
28. Davidson
29. Duplin
30. Durham
31. Edgecombe
32. Forsyth
33. Franklin
34. Gaston
35. Gates
36. Granville
37. Greene
38. Guilford
39. Halifax
40. Harnett
41. Henderson
42. Hertford
43. Hoke
44. Hyde
45. Iredell
46. Jackson
47. Johnston
48. Jones
49. Lee
50. Lenoir
51. Lincoln
52. Madison
53. Martin
54. McDowell
55. Mecklenburg
56. Mitchell

57.	Montgomery
58.	Moore
59.	Nash
60.	New Hanover
61.	Onslow
62.	Orange
63.	Pamlico
64.	Pender
65.	Person
66.	Pitt
67.	Randolph
68.	Richmond
69.	Robeson
70.	Rockingham
71.	Rowan
72.	Rutherford
73.	Sampson
74.	Stokes
75.	Surry
76.	Transylvania
77.	Union
78.	Vance
79.	Wake
80.	Warren
81.	Washington
82.	Watauga
83.	Wayne
84.	Wilkes
85.	Yadkin
86.	Yancey

- 100% of local health departments and local education agencies have access electronically to the Vision Resource Guides outlining follow-up resources for obtaining eye care.
- 537 vouchers for free eye care that were offered to 100% of eligible children who have been identified as needing eye care but cannot afford such care.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$461,997.00	\$461,997.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$81,053.17	\$
Supplies and Materials Expenses (e.g., office supplies):	\$988.28	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$10,260.36	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$19,850.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$300.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$112,451.81	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$461,997.00	\$461,997.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$169,243.90	\$
Supplies and Materials Expenses (e.g., office supplies):	\$16,183.99	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$20,654.02	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$36,400	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$600.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$243,081.91	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	National Society to Prevent Blindness – North Carolina Affiliate, Inc. (Prevent Blindness North Carolina)
Recipient Tax ID #	56-6088141
Project/Activity Title:	Vision Screening Training and Certification program to make available mass vision screenings in the NC Public Schools
Reporting Period (Quarter):	January 1, 2024 – March 31, 2024 (Quarter 3)
Report Completion Date:	April 09, 2024
Preparer of This Report:	A. Edwin Jeffords, Jr. – President & CEO

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes (Through Dec 31, 2023) No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Asynchronous and in person trainings to screen school-age children have been offered to public and charter schools. In partnership with school nurses PBNC identified new and existing school staff and volunteer screeners needing training. In-person / on-site trainings have been scheduled at a time, date, and location convenient to staff and volunteers. Participants received a manual and best-practice vision screening charts and were required to pass a written test and demonstration of skills. Those who passed both components were certified for 2 years. PBNC staff consulted with school nurses to mitigate barriers to implementing mass screening programs.

Throughout the year referred children in financial need will continue to have access to three PBNC administered voucher applications through a single online application and database.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The purpose of this contract is to provide a statewide evidence-based, age-appropriate training and certification of vision screeners across North Carolina in all 100 counties who conduct mass and individual vision screening for children of all ages in NC public and public charter schools.

The program has enabled schools and school systems to:

- provide students with access to free vision screenings in convenient locations
- accurately detect and identify suspected vision disorders at the earliest stage possible
- appropriately refer children to an eye doctor for diagnosis and treatment
- incorporate educational materials promoting health-related behaviors
- offer timely and continued follow-up for those who are referred for potential problems
- mitigate financial barriers to care by providing access to PBNC vouchers for eye exams and glasses

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

To date PBNC has:

- certified approximately 92% of the goal to train 3,000 unduplicated vision screeners
- reached participants in 100 counties of the goal to serve all 100 counties over a two-year period
- 73% of all participants trained in person.
- provided screening materials and charts to all participants needing new materials to conduct screenings
- provided an online Resource Guide outlining follow-up resources for free or low-cost eye care
- offered access to vision care through PBNC voucher programs for financially needy children
- tracked data on number of counties served and the number of screeners trained per county to date
- a survey requesting program testimonials and child success stories will be released to school nurses in the second half of the school year
- Data on the number of children screened and referred will be available to PBNC via the State School Health Nurse Consultant in June 2024. After DHHS collects the vision screening data, PBNC will work with consultants and nurses to review data consistency and accuracy.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- 2,771 screeners trained and certified to date
- 88 counties served

1. Alamance
2. Alexander
3. Alleghany
4. Anson
5. Ashe
6. Avery
7. Beaufort
8. Bertie
9. Bladen
10. Brunswick
11. Buncombe
12. Burke
13. Cabarrus
14. Caldwell
15. Camden
16. Carteret
17. Caswell
18. Catawba
19. Chatham
20. Cherokee
21. Chowan
22. Clay
23. Columbus
24. Craven
25. Cumberland
26. Currituck
27. Dare
28. Davidson
29. Duplin
30. Durham
31. Edgecombe
32. Forsyth
33. Franklin
34. Gaston
35. Gates
36. Graham
37. Granville
38. Greene
39. Guilford
40. Halifax
41. Harnett
42. Henderson
43. Hertford
44. Hoke
45. Hyde
46. Iredell
47. Jackson
48. Johnston
49. Jones
50. Lee
51. Lenoir
52. Lincoln
53. Madison
54. Martin
55. McDowell
56. Mecklenburg

57. Mitchell
58. Montgomery
59. Moore
60. Nash
61. New Hanover
62. Onslow
63. Orange
64. Pamlico
65. Pender
66. Person
67. Pitt
68. Randolph
69. Richmond
70. Robeson
71. Rockingham
72. Rowan
73. Rutherford
74. Sampson
75. Stokes
76. Surry
77. Transylvania
78. Union
79. Vance
80. Wake
81. Warren
82. Washington
83. Watauga
84. Wayne
85. Wilkes
86. Wilson
87. Yadkin
88. Yancey

- 100% of local health departments and local education agencies have access electronically to the Vision Resource Guides outlining follow-up resources for obtaining eye care.
- 944 vouchers for free eye care that were offered to 100% of eligible children who have been identified as needing eye care but cannot afford such care.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$70,304.22	\$
Supplies and Materials Expenses (e.g., office supplies):	\$14,511.81	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$6,715.37	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$17,899.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$49.49	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$300.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$109,779.89	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$239,548.12	\$
Supplies and Materials Expenses (e.g., office supplies):	\$30,695.80	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$27,369.39	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$54,299.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$49.49	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$900.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$352,861.80	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	National Society to Prevent Blindness – North Carolina Affiliate, Inc. (Prevent Blindness North Carolina)
Recipient Tax ID #	56-6088141
Project/Activity Title:	Vision Screening Training and Certification program to make available mass vision screenings in the NC Public Schools
Reporting Period (Quarter):	April 1, 2024 – June 30, 2024 (Quarter 4)
Report Completion Date:	July 11, 2024
Preparer of This Report:	A. Edwin Jeffords, Jr. – President & CEO

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Asynchronous and in person trainings to screen school-age children have been offered to public and charter schools. In partnership with school nurses PBNC identified new and existing school staff and volunteer screeners needing training. In-person / on-site trainings have been scheduled at a time, date, and location convenient to staff and volunteers. Participants received a manual and best-practice vision screening charts and were required to pass a written test and demonstration of skills. Those who passed both components were certified for 2 years. PBNC staff consulted with school nurses to mitigate barriers to implementing mass screening programs.

Throughout the year referred children in financial need will continue to have access to three PBNC administered voucher applications through a single online application and database.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The purpose of this contract is to provide a statewide evidence-based, age-appropriate training and certification of vision screeners across North Carolina in all 100 counties who conduct mass and individual vision screening for children of all ages in NC public and public charter schools.

The program has enabled schools and school systems to:

- provide students with access to free vision screenings in convenient locations
- accurately detect and identify suspected vision disorders at the earliest stage possible
- appropriately refer children to an eye doctor for diagnosis and treatment
- incorporate educational materials promoting health-related behaviors
- offer timely and continued follow-up for those who are referred for potential problems
- mitigate financial barriers to care by providing access to PBNC vouchers for eye exams and glasses

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

To date PBNC has:

- certified approximately over 101% (3,056) of the goal to train 3,000 unduplicated vision screeners
- reached participants in 100 counties of the goal to serve all 100 counties over a two-year period
- 73% of all participants trained in person.
- provided screening materials and charts to all participants needing new materials to conduct screenings
- provided an online Resource Guide outlining follow-up resources for free or low-cost eye care
- offered access to vision care through PBNC voucher programs for financially needy children
- tracked data on number of counties served and the number of screeners trained per county to date
- a survey requesting program testimonials and child success stories will be released to school nurses in the second half of the school year
- Data on the number of children screened and referred will be available to PBNC via the State School Health Nurse Consultant in August 2024. After DHHS collects the vision screening data, PBNC will work with consultants and nurses to review data consistency and accuracy.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- 3,056 screeners trained and certified to date
- 90 counties served

1. Alamance
2. Alexander
3. Alleghany
4. Anson
5. Ashe
6. Avery
7. Beaufort
8. Bertie
9. Bladen
10. Brunswick
11. Buncombe
12. Burke
13. Cabarrus
14. Caldwell
15. Camden
16. Carteret
17. Caswell
18. Catawba
19. Chatham
20. Cherokee
21. Chowan
22. Clay
23. Columbus
24. Craven
25. Cumberland
26. Currituck
27. Dare
28. Davidson
29. Davie
30. Duplin
31. Durham
32. Edgecombe
33. Forsyth
34. Franklin
35. Gaston
36. Gates
37. Graham
38. Granville
39. Greene
40. Guilford
41. Halifax
42. Harnett
43. Henderson
44. Hertford
45. Hoke
46. Hyde
47. Iredell
48. Jackson
49. Johnston
50. Jones
51. Lee
52. Lenoir
53. Lincoln
54. Madison
55. Martin
56. McDowell

57. Mecklenburg
58. Mitchell
59. Montgomery
60. Moore
61. Nash
62. New Hanover
63. Onslow
64. Orange
65. Pamlico
66. Pender
67. Person
68. Pitt
69. Primary Care Provider
70. Randolph
71. Richmond
72. Robeson
73. Rockingham
74. Rowan
75. Rutherford
76. Sampson
77. Stokes
78. Surry
79. Transylvania
80. Union
81. Vance
82. Wake
83. Warren
84. Washington
85. Watauga
86. Wayne
87. Wilkes
88. Wilson
89. Yadkin
90. Yancey

- 100% of local health departments and local education agencies have access electronically to the Vision Resource Guides outlining follow-up resources for obtaining eye care.
- 1,230 vouchers for free eye care that were offered to 100% of eligible children who have been identified as needing eye care but cannot afford such care.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$66,567.59	\$
Supplies and Materials Expenses (e.g., office supplies):	\$1,663.48	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$4,801.62	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$20,120.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$370.51	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$15,612.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$109,135.20	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$306,115.71	\$
Supplies and Materials Expenses (e.g., office supplies):	\$32,359.28	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$32,171.01	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$74,419.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$420.00	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$16,512.00	\$
Other Expenses (Specify):	\$0.00	\$
Total Expenses:	\$461,997.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Residential Services, Inc
Recipient Tax ID #	56-1101520
Project/Activity Title:	RSI- Aberdeen
Reporting Period (Quarter):	July 1, 2023 to December 31, 2023
Report Completion Date:	January 15, 2024
Preparer of This Report:	Tara Henderson/Kymberlei Schmidt

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During the reporting period, RSI staff and individuals, met all the goals and outcomes outlined in the Direct Grant. This achievement has translated into an opportunity for the young men to not just participate but truly thrive within the community. Moreover, the grant provided these young men trans-formative experiences allowing the to develop independence in their daily living skills. This reporting period we have layed new foundation for the future of these men to strive within the community.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

1. The individuals living at the Residential Services, Inc. Aberdeen home will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

RSI provided support and service at Aberdeen group home (a specialized community based residential environment) 24 hours a day for 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% of the contract year.

The Aberdeen staff provided 100% of the individuals living at Aberdeen the supports needed to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

**3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s).
Have you accomplished any of your expected results?**

The young men who live at the Residential Services, Inc. Aberdeen home will live in the community with the supports and services they need to succeed and thrive. These young men have unique needs that are not supported by typical community residential programs and without the unique supports provided by RSI-Aberdeen, community living would not be possible. Because of their complex needs and behavioral challenges, each of the residents is at risk of requiring institutionalization, hospitalization, or law enforcement involvement if funding for Aberdeen is not secured. In compliance with the principles set forth in *Olmstead v. L.C.* (1999) and in alignment with leveraging the updated North Carolina Olmstead Plan, the Aberdeen home provides a choice for its residents to live and participate in their community in the most inclusive and integrated setting available. Since its establishment, the Aberdeen home has successfully demonstrated tangible and measurable benefits in terms of improved well-being and significant cost savings when compared to the expenses associated with institutional care. Cost savings are immediate when individuals are successfully served in the community rather than in a more expensive institutional or hospital setting. The cost savings grow exponentially over time due to the community-based treatment provided, which leads to reduced long-term expenses throughout an individual's

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The individuals living at Aberdeen will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

The Aberdeen staff provided support and service in a specialized community based residential environment that provides 24 hour awake staff in full compliance with the requirements of the HCBS Setting Final Rule or 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% the contract year.

The Aberdeen staff provided 100% of the individuals living at Aberdeen the supports needed to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

4. Annually, Quality Surveys completed by parents, guardians, and community professionals will demonstrate a minimum 90% satisfaction rate with services provided by the Aberdeen home.

The 2023 parent, guardian and community professional survey for the Aberdeen results showed a 100% satisfaction rate.

5. 100% of Aberdeen residents will have an individualized support plan that addresses needs and preferences to live in their community for 100% of the contract year.

This quarter 100% of the Aberdeen residents have an individual support plan that addresses the needs and preference to live in their community for 100% of the quarter.

6. 100% of the individuals living at Aberdeen will successfully live in the community 100% of the time without institutionalization, incarceration, or hospital admission.

This quarter 100% of the individuals living at Aberdeen live in the community 100% of the time without respite, incarceration, institutionalization or admission to the hospital.

7. 100% of the individuals living at Aberdeen will access and participate in their local community (e.g. local parks, grocery shopping, school, religious activities, community events, etc.) each week for 100% of the contract year.

This quarter 100% of the individuals living at Aberdeen had access and participate in their local community each week for 100% of the quarter.

8. 100% of the individuals living at Aberdeen will have their healthcare needs met, including receiving follow-up as requested by the individual's medical and dental professionals, 100% of the contract year.

This quarter 100% of the individuals living at Aberdeen had their healthcare needs met, 100% of the quarter.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	250,000.00	250,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 75,481.49	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,786.75	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 77,268.24	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 137,714.41	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 3,817.05	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 141,531.46	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Residential Services, Inc
Recipient Tax ID #	56-1101520
Project/Activity Title:	RSI - Aberdeen
Reporting Period (Quarter):	January 1 2024 to March 31, 2024
Report Completion Date:	April 15, 2024
Preparer of This Report:	Tara Henderson/Kymberlei Schmidt

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During the second quarter, RSI staff and individuals, met all the goals and outcomes outlined in the Direct Grant. This achievement has translated into an opportunity for the young men to not just participate but truly thrive within the community. Moreover, the grant provided these young men trans-formative experiences allowing the to develop independence in their daily living skills. This reporting period we have provided a new foundation for the future of these men to strive within the community.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

1. The individuals living at the Residential Services, Inc. Aberdeen home will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

RSI provided support and service at Aberdeen group home (a specialized community based residential environment) 24 hours a day for 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% of the contract year.

The Aberdeen staff provided 100% of the individuals living at Aberdeen the supports needed to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

**3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s).
Have you accomplished any of your expected results?**

The young men who live at the Residential Services, Inc. Aberdeen home will live in the community with the supports and services they need to succeed and thrive. These young men have unique needs that are not supported by typical community residential programs and without the unique supports provided by RSI-Aberdeen, community living would not be possible. Because of their complex needs and behavioral challenges, each of the residents is at risk of requiring institutionalization, hospitalization, or law enforcement involvement if funding for Aberdeen is not secured. In compliance with the principles set forth in *Olmstead v. L.C.* (1999) and in alignment with leveraging the updated North Carolina Olmstead Plan, the Aberdeen home provides a choice for its residents to live and participate in their community in the most inclusive and integrated setting available. Since its establishment, the Aberdeen home has successfully demonstrated tangible and measurable benefits in terms of improved well-being and significant cost savings when compared to the expenses associated with institutional care. Cost savings are immediate when individuals are successfully served in the community rather than in a more expensive institutional or hospital setting. The cost savings grow exponentially over time due to the community-based treatment provided, which leads to reduced long-term expenses throughout an individual's

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The individuals living at Aberdeen will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

The Aberdeen staff provided support and service in a specialized community based residential environment that provides 24 hour awake staff in full compliance with the requirements of the HCBS Setting Final Rule or 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% the contract year.

The Aberdeen staff provided 100% of the individuals living at Aberdeen the supports needed to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

4. Annually, Quality Surveys completed by parents, guardians, and community professionals will demonstrate a minimum 90% satisfaction rate with services provided by the Aberdeen home.

The 2024 parent, guardian and community professional survey for the Aberdeen results showed a 100% satisfaction rate.

5. 100% of Aberdeen residents will have an individualized support plan that addresses needs and preferences to live in their community for 100% of the contract year.

This quarter 100% of the Aberdeen residents have an individual support plan that addresses the needs and preference to live in their community for 100% of the quarter.

6. 100% of the individuals living at Aberdeen will successfully live in the community 100% of the time without institutionalization, incarceration, or hospital admission.

This quarter 100% of the individuals living at Aberdeen live in the community 100% of the time without respite, incarceration, institutionalization or admission to the hospital.

7. 100% of the individuals living at Aberdeen will access and participate in their local community (e.g. local parks, grocery shopping, school, religious activities, community events, etc.) each week for 100% of the contract year.

This quarter 100% of the individuals living at Aberdeen had access and participate in their local community each week for 100% of the quarter.

8. 100% of the individuals living at Aberdeen will have their healthcare needs met, including receiving follow-up as requested by the individual's medical and dental professionals, 100% of the contract year.

This quarter 100% of the individuals living at Aberdeen had their healthcare needs met for 100% of the quarter.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	250,000.00	250,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 58,242.56	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 2,446.77	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 60,689.33	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 195,956.96	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 6,263.82	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 202,220.78	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Residential Services Inc
Recipient Tax ID #	56-1101520
Project/Activity Title:	RSI - Aberdeen Directed Grant
Reporting Period (Quarter):	April 1 2024 to June 30, 2024
Report Completion Date:	July 15, 2024
Preparer of This Report:	Tara Henderson/Kymberlei Schmidt

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During the fourth quarter, RSI staff and residents, met all the goals and outcomes outlined in the Direct Grant. This achievement has translated into an opportunity for the young men to not just participate but continue to truly thrive within the community. Moreover, the grant provided these young men trans-formative experiences allowing the to develop independence in their daily living skills. This reporting period we have provided a new foundation for the future of these men to successfully live within the community.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

1. The individuals living at the Residential Services, Inc. Aberdeen home will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

RSI continues to provided support and service at Aberdeen group home (a specialized community based residential environment) 24 hours a day for 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% of the contract year.

The Aberdeen staff continue to provide 100% of the individuals living at Aberdeen the supports needed to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

**3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s).
Have you accomplished any of your expected results?**

The young men who live at the Residential Services, Inc. Aberdeen home will live in the community with the supports and services they need to succeed and thrive. These young men have unique needs that are not supported by typical community residential programs and without the unique supports provided by RSI-Aberdeen, community living would not be possible. Because of their complex needs and behavioral challenges, each of the residents is at risk of requiring institutionalization, hospitalization, or law enforcement involvement if funding for Aberdeen is not secured. In compliance with the principles set forth in *Olmstead v. L.C.* (1999) and in alignment with leveraging the updated North Carolina Olmstead Plan, the Aberdeen home provides a choice for its residents to live and participate in their community in the most inclusive and integrated setting available. Since its establishment, the Aberdeen home has successfully demonstrated tangible and measurable benefits in terms of improved well-being and significant cost savings when compared to the expenses associated with institutional care. Cost savings are immediate when individuals are successfully served in the community rather than in a more expensive institutional or hospital setting. The cost savings grow exponentially over time due to the community-based treatment provided, which leads to reduced long-term expenses throughout an individual's

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

1. The individuals living at Aberdeen will receive supports and services in a specialized community based residential environment with 24-hour awake staff for 100% of the contract year, in full compliance with the requirements of the HCBS Settings Final Rule.

The Aberdeen staff provided support and service in a specialized community based residential environment that provides 24 hour awake staff in full compliance with the requirements of the HCBS Setting Final Rule or 100% of the quarter.

2. 100% of the individuals living at Aberdeen will have supports needed to live in the community for 100% the contract year.

The Aberdeen staff provided 100% of the residents living at Aberdeen the supports needed to continue to live in the community for 100% of the quarter.

3. 100% of the employees providing direct support at the Aberdeen home will receive specialized autism specific intervention training during their introductory period.

This quarter 100% of the employees providing direct support at the Aberdeen home received specialized autism/resident specific intervention training during their employment introductory period.

4. Annually, Quality Surveys completed by parents, guardians, and community professionals will demonstrate a minimum 90% satisfaction rate with services provided by the Aberdeen home.

The 2024 parent, guardian and community professional survey for the Aberdeen results showed a 100% satisfaction rate.

5. 100% of Aberdeen residents will have an individualized support plan that addresses needs and preferences to live in their community for 100% of the contract year.

100% of the Aberdeen residents have an individual support plan that addresses the needs and preference to live in their community for 100% of the quarter.

6. 100% of the individuals living at Aberdeen will successfully live in the community 100% of the time without institutionalization, incarceration, or hospital admission.

This quarter 100% of the individuals living at Aberdeen live in the community 100% of the time without respite, incarceration, institutionalization or admission to the hospital.

7. 100% of the individuals living at Aberdeen will access and participate in their local community (e.g. local parks, grocery shopping, school, religious activities, community events, etc.) each week for 100% of the contract year.

This quarter 100% of the individuals living at Aberdeen had access and participate in their local community each week for 100% of the quarter.

8. 100% of the individuals living at Aberdeen will have their healthcare needs met, including receiving follow-up as requested by the individual's medical and dental professionals, 100% of the contract year.

100% of the individuals living at Aberdeen had their healthcare needs met for 100% of the quarter.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	250,000.00	250,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 123,907.53	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 1,549.68	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 125,457.21	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 319,864.49	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$ 7,813.50	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 327,677.99	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	SAIL Initiative, Inc
Recipient Tax ID #	82-1534714
Project/Activity Title:	23-25 Biennium Directed Grant – SAIL Initiative
Reporting Period (Quarter):	July 1, 2023 – December 31, 2023
Report Completion Date:	January 2, 2024
Preparer of This Report:	Marla Hardenbergh, MD

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

SAIL Initiative provides funding for Breeches Buoy Addiction Medicine Service to provide addiction medicine services for patients presenting to UNC Health Southeastern, a community-based hospital serving Robeson and surrounding counties. From July 1, 2023 through December 31, 2023, 787 unduplicated patients received an addiction medicine consultation performed by Breeches Buoy Addiction Medicine service at UNC Health Southeastern. 40% of patients served were referred to inpatient treatment for substance use disorder, 60% were referred to outpatient treatment and 5% refused referral to treatment for substance use disorder following acute hospitalization.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

SAIL Initiative used directed grant funding for salaries, benefits, and related expenses for BBAMS clinical staff. BBAMS clinicians (Psychiatric Nurse Practitioners) provided acute clinical stabilization and evidence based long term treatment plan using the American Society of Addiction Medicine Criteria for each patient. Clinical Peer Support Specialists provided assistance with access to aftercare throughout and immediately following each hospital encounter. Licensed Substance Use Disorder Counselor provided motivational interviewing and psychotherapy services to increase patient directed involvement in treatment plan. All services were supervised by a medical doctor board certified in Addiction Medicine. All objectives regarding support of these services were accomplished during this reporting period.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Formal substance use disorder assessment following an acute event requiring ED visit or hospitalization was increased by 100% secondary to the services of Breeches Buoy Addiction Medicine Service during the reporting period. Clinical peer support specialist engagement during hospitalization or ED encounter increased by 100% during the reporting period. These percentages are increased from 0% in traditional community hospital settings as addiction medicine is largely uncompensated care and is therefore not incorporated in hospital service lines. The institution of addiction medicine (BBAMS) at UNC Health Southeastern brings 0% of patients receiving expert addiction medicine acute stabilization and opportunity for assistance with access to aftercare to 100% for patients receiving consultation Monday through Friday from 8am to 5pm.

The clinical counseling provided to patients by BBAMS staff both patient understanding of their disease and confidence in evidence-based aftercare have been increased. BBAMS team is working to develop a survey instrument to assess both metrics.

BBAMS has been able to increase access to acute substance use disorder stabilization in the interim between hospital discharge and aftercare appointments (both inpatient and outpatient) through the development of an acute outpatient service. BBAMS clinical providers continue to see patients in the outpatient office and via telehealth providing medical management and continued supportive counseling prior to the aftercare appointment.

BBAMS service was instituted at UNC Health Southeastern in June of 2021. ED visits due to overdose in 2022 were 454 per DHHS reporting for Robeson County. ED visits due to overdose for the YTD reporting for 2023 were reduced to 269. While variables that may contribute to this decrease are not accounted for, this decrease mirroring the advent of hospital-based addiction medicine services is likely not anecdotal.

Since BBAMS service was instituted in June of 2021, the percentage of duplicated consultations resulting from repeat hospital encounter has decreased from 60% to 20% via observational analysis.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

BBAMS is working with a research analyst to collect and maintain data prospectively using the development of a HIPPA compliant database. Total number of consultations (duplicated and unduplicated) and stratification of the same includes specific substance use disorder (alcohol, opioid, stimulant, etc.), type of aftercare treatment plan (inpatient versus outpatient), administration of MAT (buprenorphine), race, gender, and age.

Data for total number of CPSS encounters will be collected through development of acute outpatient BBAMS program in the coming months. Individual CPSS encounters cannot be assessed in the hospital as all independent documentation must be entered by a clinical provider (Nurse Practitioner or Medical Doctor).

Development of a survey instrument to be administered by CPSS to assess patient fund of knowledge regarding disease and confidence in treatment for substance use disorder is being developed.

BBAMS is developing a database to collect acute outpatient encounters both by clinical providers and CPSS following hospital discharge and prior to engagement in long term treatment.

BBAMS services will continue to monitor the DHHS dashboard for Robeson County regarding the number of overdose encounters in the ED at UNC Health Southeastern.

BBAMS will continue to monitor and report the number of duplicated ED visits using the data collected and maintained from the EMR and compared with total encounters submitted by external administrative service.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$275,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$275,000.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$275,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$275,000.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	SAIL Initiative, Inc
Recipient Tax ID #	82-1534714
Project/Activity Title:	23-25 Biennium Directed Grant – SAIL Initiative
Reporting Period (Quarter):	January 1, 2024 – March 31, 2023
Report Completion Date:	March 31, 2024
Preparer of This Report:	Marla Hardenbergh, MD

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

SAIL Initiative provides funding for Breeches Buoy Addiction Medicine Service to provide addiction medicine services for patients presenting to UNC Health Southeastern, a community-based hospital serving Robeson and surrounding counties. From January 1, 2024 through March 31, 2024, 134 unduplicated patients received an addiction medicine consultation performed by Breeches Buoy Addiction Medicine service at UNC Health Southeastern. 24% of patients served were referred to inpatient treatment for substance use disorder, 45% were referred to outpatient treatment and 26% refused referral to treatment for substance use disorder following acute hospitalization.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

SAIL Initiative used directed grant funding for salaries, benefits, and related expenses for BBAMS clinical staff. BBAMS clinicians (Psychiatric Nurse Practitioners) provided acute clinical stabilization and evidence based long term treatment plan using the American Society of Addiction Medicine Criteria for each patient. Clinical Peer Support Specialists provided assistance with access to aftercare throughout and immediately following each hospital encounter. Licensed Substance Use Disorder Counselor provided motivational interviewing and psychotherapy services to increase patient directed involvement in treatment plan. All services were supervised by a medical doctor board certified in Addiction Medicine. All objectives regarding support of these services were accomplished during this reporting period.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Formal substance use disorder assessment following an acute event requiring ED visit or hospitalization was increased by 100% secondary to the services of Breeches Buoy Addiction Medicine Service during the reporting period. Clinical peer support specialist engagement during hospitalization or ED encounter increased by 100% during the reporting period. These percentages are increased from 0% in traditional community hospital settings as addiction medicine is largely uncompensated care and is therefore not incorporated in hospital service lines. The institution of addiction medicine (BBAMS) at UNC Health Southeastern brings 0% of patients receiving expert addiction medicine acute stabilization and opportunity for assistance with access to aftercare to 100% for patients receiving consultation Monday through Friday from 8am to 5pm.

The clinical counseling provided to patients by BBAMS staff both patient understanding of their disease and confidence in evidence-based aftercare have been increased. 100% Number of surveys were provided to patients showing the following results during the reporting period referenced above: Beginning March 13, 2024, pre and post intervention surveys were offered to assess patient perceptions and understanding of substance abuse disorder concepts and components. 32 total surveys were offered (21 PRE and 11 POST). 13 responses were gathered for the PRE survey and 8 were declined (62% response rate). 7 responses were gathered for the POST survey and 4 were declined (64% response rate). While there are unequal volumes of responses for the PRE and POST surveys, the aggregate increase in patient-reported perception/understanding for all 4 survey questions is encouraging as we continue to refine our peer support efforts.

- Survey question 1: "How well do you understand the criteria experts use to diagnose substance use disorder/addiction?" Average PRE survey response of 2.55/5.0 increased to 4.71/5.0 average POST survey response (**85% increase**).
- Survey question 2: "How well do you understand the role of dopamine in the disease of addiction?" Average PRE survey response of 2.64/5.0 increased to 4.43/5.0 average POST survey response (**68% increase**).
- Survey question 3: "How treatable do you believe the disease of addiction is?" Average PRE survey response of 4.0/5.0 increased to 5.0/5.0 average POST survey response (**25% increase**)
- Survey question 4: "How important do you think 12 step programs (AA/NA) are in maintaining disease remission?" Average PRE survey response of 4.27/5.0 increased to 4.86/5.0 average POST survey response (**14% increase**)

BBAMS has been able to increase access to acute substance use disorder stabilization in the interim between hospital discharge and aftercare appointments (both inpatient and outpatient) through the development of an acute outpatient service. BBAMS clinical providers continue to see patients in the outpatient office and via telehealth providing medical management and continued supportive counseling prior to the aftercare appointment.

BBAMS service was instituted at UNC Health Southeastern in June of 2021. ED visits due to overdose in 2022 were 454 per DHHS reporting for Robeson County. ED visits due to overdose for the YTD reporting for 2023 were reduced to 269. 24 ED overdose visits YTD in comparison to 33 ED overdose visits for this time period last year. While variables that may contribute to this decrease are not accounted for, this decrease mirroring the advent of hospital-based addiction medicine services is likely not anecdotal.

Since BBAMS service was instituted in June of 2021, the percentage of duplicated consultations resulting from repeat hospital encounter has decreased from 60% to 20% via observational analysis.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

BBAMS is working with a research analyst to collect and maintain data prospectively using the development of a HIPPA compliant database. Total number of consultations (duplicated and unduplicated) and stratification of the same includes specific substance use disorder (alcohol, opioid, stimulant, etc.), type of aftercare treatment plan (inpatient versus outpatient), administration of MAT (buprenorphine), race, gender, and age.

Data for total number of CPSS encounters will be collected through development of acute outpatient BBAMS program in the coming months. Individual CPSS encounters cannot be assessed in the hospital as all independent documentation must be entered by a clinical provider (Nurse Practitioner or Medical Doctor).

Survey instrument is being administered by CPSS to assess patient fund of knowledge regarding disease and confidence in treatment for substance use disorder. Current findings are outlined under section 3 above.

BBAMS is developing a database to collect acute outpatient encounters both by clinical providers and CPSS following hospital discharge and prior to engagement in long term treatment.

BBAMS services will continue to monitor the DHHS dashboard for Robeson County regarding the number of overdose encounters in the ED at UNC Health Southeastern.

BBAMS will continue to monitor and report the number of duplicated ED visits using the data collected and maintained from the EMR and compared with total encounters submitted by external administrative service.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$137,500.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$137,500.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$412,500.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$412,500.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	SAIL Initiative, Inc
Recipient Tax ID #	82-1534714
Project/Activity Title:	23-25 Biennium Directed Grant – SAIL Initiative
Reporting Period (Quarter):	April 1, 2024 – June 30, 2023 - REVISION 1
Report Completion Date:	July 1, 2024
Preparer of This Report:	Marla Hardenbergh, MD

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

SAIL Initiative provides funding for Breeches Buoy Addiction Medicine Service to provide addiction medicine services for patients presenting to UNC Health Southeastern, a community-based hospital serving Robeson and surrounding counties. From April 1, 2024 through June 30, 2024, 202 unduplicated patients received an addiction medicine consultation performed by Breeches Buoy Addiction Medicine service at UNC Health Southeastern. 29% of patients served were referred to inpatient treatment for substance use disorder, 44% were referred to outpatient treatment and 26% refused referral to treatment for substance use disorder following acute hospitalization.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

SAIL Initiative used directed grant funding for salaries, benefits, and related expenses for BBAMS clinical staff. BBAMS clinicians (Psychiatric Nurse Practitioners) provided acute clinical stabilization and evidence based long term treatment plan using the American Society of Addiction Medicine Criteria for each patient. Clinical Peer Support Specialists provided assistance with access to aftercare throughout and immediately following each hospital encounter. Licensed Substance Use Disorder Counselor provided motivational interviewing and psychotherapy services to increase patient directed involvement in treatment plan. All services were supervised by a medical doctor board certified in Addiction Medicine. All objectives regarding support of these services were accomplished during this reporting period.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Formal substance use disorder assessment following an acute event requiring ED visit or hospitalization was increased by 100% secondary to the services of Breeches Buoy Addiction Medicine Service during the reporting period. Clinical peer support specialist engagement during hospitalization or ED encounter increased by 100% during the reporting period. These percentages are increased from 0% in traditional community hospital settings as addiction medicine is largely uncompensated care and is therefore not incorporated in hospital service lines. The institution of addiction medicine (BBAMS) at UNC Health Southeastern brings 0% of patients receiving expert addiction medicine acute stabilization and opportunity for assistance with access to aftercare to 100% for patients receiving consultation Monday through Friday from 8am to 5pm.

The clinical counseling provided to patients by BBAMS staff both patient understanding of their disease and confidence in evidence-based aftercare have been increased. 100% Number of surveys were provided to patients showing the following results during the reporting period referenced above: Beginning March 13, 2024, pre and post intervention surveys were offered to assess patient perceptions and understanding of substance abuse disorder concepts and components. 65 total surveys were offered (45 PRE and 20 POST). 25 responses were gathered for the PRE survey and 20 were declined (53% response rate). 10 responses were gathered for the POST survey and 10 were declined (50% response rate). While there are unequal volumes of responses for the PRE and POST surveys, the aggregate increase in patient-reported perception/understanding for all 4 survey questions is encouraging as we continue to refine our peer support efforts.

- Survey question 1: “How well do you understand the criteria experts use to diagnose substance use disorder/addiction?” Average PRE survey response of 1.9/5.0 increased to 4.8/5.0 average POST survey response (**72% increase**).
- Survey question 2: “How well do you understand the role of dopamine in the disease of addiction?” Average PRE survey response of 2.3/5.0 increased to 4.6/5.0 average POST survey response (**51% increase**).
- Survey question 3: “How treatable do you believe the disease of addiction is?” Average PRE survey response of 4.0/5.0 increased to 5.0/5.0 average POST survey response (**25% increase**)
- Survey question 4: “How important do you think 12 step programs (AA/NA) are in maintaining disease remission?” Average PRE survey response of 4.27/5.0 increased to 4.86/5.0 average POST survey response (**14% increase**)

BBAMS has been able to increase access to acute substance use disorder stabilization in the interim between hospital discharge and aftercare appointments (both inpatient and outpatient) through the development of an acute outpatient service. BBAMS clinical providers continue to see patients in the outpatient office and via telehealth providing medical management and continued supportive counseling prior to the aftercare appointment.

BBAMS service was instituted at UNC Health Southeastern in June of 2021. ED visits due to overdose in 2022 were 454 per DHHS reporting for Robeson County. ED visits due to overdose for the YTD reporting for 2023 were reduced to 269. 48 ED overdose visits YTD in comparison to 65 ED overdose visits for this time period last year. While variables that may contribute to this decrease are not accounted for, this decrease mirroring the advent of hospital-based addiction medicine services is likely not anecdotal.

Since BBAMS service was instituted in June of 2021, the percentage of duplicated consultations resulting from repeat hospital encounter has decreased from 60% to 20% via observational analysis.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

BBAMS is working with a research analyst to collect and maintain data prospectively using the development of a HIPPA compliant database. Total number of consultations (duplicated and unduplicated) and stratification of the same includes specific substance use disorder (alcohol, opioid, stimulant, etc.), type of aftercare treatment plan (inpatient versus outpatient), administration of MAT (buprenorphine), race, gender, and age.

Data for total number of CPSS encounters will be collected through development of acute outpatient BBAMS program in the coming months. Individual CPSS encounters cannot be assessed in the hospital as all independent documentation must be entered by a clinical provider (Nurse Practitioner or Medical Doctor).

Survey instrument is being administered by CPSS to assess patient fund of knowledge regarding disease and confidence in treatment for substance use disorder. Current findings are outlined under section 3 above.

BBAMS is developing a database to collect acute outpatient encounters both by clinical providers and CPSS following hospital discharge and prior to engagement in long term treatment.

BBAMS services will continue to monitor the DHHS dashboard for Robeson County regarding the number of overdose encounters in the ED at UNC Health Southeastern.

BBAMS will continue to monitor and report the number of duplicated ED visits using the data collected and maintained from the EMR and compared with total encounters submitted by external administrative service.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$137,500.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$137,500.00	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$550,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$550,000.00	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	NC SENIOR GAMES INC.
Recipient Tax ID #	58-1584785
Project/Activity Title:	NC SENIOR GAMES PROGRAMS
Reporting Period (Quarter):	JULY - SEPT. 2023
Report Completion Date:	1-8-24
Preparer of This Report:	BRIAN ALLEN

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- STATE FINALS SPORTS - ARTS ACTIVITIES FOR OVER 3,200 PARTICIPANTS
- OVER 1,000 VOLUNTEERS ORGANIZED
- IN-KIND REVENUE OVER \$60,000

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- OUTREACH TO DIVERSE RURAL COMMUNITIES
- SERVICE TO ALL 100 COUNTIES

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- HOSTED THE LARGEST STATE FINALS EVER IN HISTORY -- PICKLEBALL
- SERVING OVER 16,000 INDIVIDUALS STATEWIDE

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- PARTICIPATION IS RETURNING TO PRE-PANDEMIC LEVELS

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 62,500	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 62,500	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 62,500	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 62,500	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	NC SENIOR GAMES INC
Recipient Tax ID #	58-1584785
Project/Activity Title:	NC SENIOR GAMES PROGRAMS
Reporting Period (Quarter):	OCT - DEC 2024
Report Completion Date:	1-8-24
Preparer of This Report:	BRIAN ALLEN

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- EVENTS IN CARY, CLAYTON, GREENVILLE
SERVING 860 PARTICIPANTS
- "TRIAD THE TRIAD" WORKSHOP FOR
45 INDIVIDUALS IN RALEIGH

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- ARRIVED SANCTIONING FOR 54 LOCAL
SENIOR GAMES, THE LARGEST NUMBER
OF ANY STATE IN THE COUNTRY
- SWAIN COUNTY IS NEWEST PROGRAM

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- CONDUCTED "SAFE" SCREENING AT
STATE FINALS WITH 97/101
PROFESSIONALS
- SENIOR GAMES PROMINENTLY FEATURED
IN IOM TASK FORCE REPORT

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- "SAFE" DATA FORTNIGHT
- LARGEST NUMBER OF LOCAL GAMES IN HISTORY

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 62,500	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 62,500	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$ 125,000	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 125,000	\$

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Senior Games, Inc.
Recipient Tax ID #	58-1584785
Project/Activity Title:	Senior Games Year-Round Programming
Reporting Period (Quarter):	FY 23-24 Q3 January, February, March 2024
Report Completion Date:	11-1-24
Preparer of This Report:	Brad Allen

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Conducted Train the Trainer workshops for Local Coordinators, SilverArts Coordinators, Event Managers, Ambassadors and volunteers. Total reach was 360 trained;
- Worked with 54 Local Senior Games to provide programming to all 100 counties across the state;
- Engaged over 2,000 volunteers at the local level;
- Welcomed a new Local Senior Games in Swain County

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Outreach to diverse and rural communities continues;
- Workshops were held in Asheville and Cary to ensure geographic reach and diversity;
- NCSG continues to provide service to all 100 counties in North Carolina

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- North Carolina continues to have the largest number of Local Senior Games of any program of its type in the nation;
- For this program year, there were over 17,000 year round participants

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Participation is still returning to pre-pandemic levels, with a surge in participation at senior centers in particular;
- NCSG has been very active in the work of the “All Ages, All Stages” initiative to reinforce the importance of wellness and health promotion for older persons.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$187,500	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$187,500	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u> SFY 2023-2024	<u>Amount of Expenditure</u> SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$187,500	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$187,500	\$0

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Senior Games, Inc.
Recipient Tax ID #	58-1584785
Project/Activity Title:	Senior Games Year-Round Programming
Reporting Period (Quarter):	FY 23-24 Q4 April, May, June 2024
Report Completion Date:	11-1-24
Preparer of This Report:	Brad Allen

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

-Conducted Train the Trainer workshops for State Finals personnel, including SilverArts Coordinators, Event Managers, Committee Co-Chairs and volunteers. Total reach was 168 trained;
- Continued to work this quarter with 54 Local Senior Games to provide programming to all 100 counties across the state;
- NCSG Staff provided outreach and programming for a Celebration sponsored by NCDAAS, AARPNC and the NC Coalition on Aging in recognition of Older Americans' Month;
-Finally, this quarter we continued to work with the National Senior Games Association to enhance the North Carolina model of Healthy Aging across the entire country

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

-Yes, we continued to work within the parameters the Scope of Work in conjunction with DAAS and statewide partners

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

- North Carolina continues to have the largest number of Local Senior Games of any program of its type in the nation;
- For this program year, there were over 17,000 year round participants

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

- Participation is still returning to pre-pandemic levels, with a surge in participation at senior centers in particular;
- NCSG has been very active in the work of the “All Ages, All Stages” initiative to reinforce the importance of wellness and health promotion for older persons.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$250,000	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$250,000	\$0

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u> SFY 2023-2024	<u>Amount of Expenditure</u> SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$250,000	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$250,000	\$0

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Special Olympics North Carolina
Recipient Tax ID #	56-1149607
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	FY24 Q1
Report Completion Date:	Jan. 23, 2024
Preparer of This Report:	Amy P. Johnson

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

Special Olympics North Carolina kicked off its program year with fall season sports training and competition occurring throughout the state for children and adults with intellectual disabilities of all ages. Fall sports included bocce, bowling, softball, golf, soccer, tennis, flag football, cycling and roller skating. To make this activity possible, Special Olympics North Carolina collaborated with its strong base of volunteer leadership established in every county for delivery of programming through partnering community-based agencies such as parks and recreation departments, schools and group homes. Coaches are critical to availability of sports programming. As such, the organization offered multiple coach training opportunities, allowing volunteers to become certified in various sports, equipping them to effectively come alongside Special Olympics athletes, mentoring them and teaching new skills. Culminating competition opportunities for athletes represented a highlight of Q1. These occurred in communities throughout the state as local opportunities, some involving athletes from multiple counties per event. Additionally, a state-level equestrian tournament was held at the Tryon International Equestrian Center in Polk County. During this event, Special Olympics North Carolina hosted a health care access opportunity through which participating athletes were able to receive no-cost sports physicals and health education. All activity was supported by community-based volunteers.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Special Olympics North Carolina made progress toward achievement of all objectives supported by the directed grant. Objectives and results are as follows:

1) Address risks of compromised health faced by people with intellectual disabilities with an outreach effort that identifies eligible individuals and registers them as Special Olympics athletes: During FY24 Q1, Special Olympics North Carolina reached 1,075 new individuals with intellectual disabilities and brought them into the Special Olympics program where they gained inclusion in structured physical activity through sports and fitness, complemented by health programming impacting health risks for the population. 2) Support physical activity for improved aspects of physical and mental health by providing community-based training in up to 20 sports at facilities statewide for new and current athletes: Special Olympics North Carolina worked closely with community-based partners throughout the state including schools, parks and recreation departments, group homes and other agencies to deliver Special Olympics training in many of its 20 sports offerings during the first quarter. While July-September is a slower time for Special Olympics due to the summer months and much of the programming occurs in collaboration with schools, athletes throughout the state still trained in sports like equestrian, golf, bocce, swimming and softball, for example. 3) Support a network of 1,800 community-based coaches by providing 200 new coach training certifications qualifying volunteers to work alongside athletes: 1,740 coaches were supported with new coach training and certification opportunities during Q1, with 314 new certifications awarded. Certifications were earned in the following sports/disciplines: bocce, cycling, flag football, golf, roller skating, soccer, softball, tennis, and "Coaching Special Olympics Athletes." 4) Provide training and orientation for 4,000 new community-based volunteers to support the athletes in their activities: 872 new volunteers were trained during Q1. 5) Provide 350 culminating local/county competition opportunities during the two-year project period, and 8 state-level competitions throughout the state for athletes completing minimum training requirements: During Q1, which is the slowest period of activity due to the summer months, at least six culminating local-level competition opportunities were held across the sports of golf, equestrian and basketball in Wake, New Hanover, Mecklenburg and New Hanover counties. Additionally, a state-level equestrian competition opportunity was held at the Tryon International Equestrian Center in Polk County. 6) Improve healthcare accessibility for the population with a provision of fitness programming and health education, and health screenings and exams: During Q1, athletes who attended the state-level Equestrian Tournament had access to no-cost physical exams and health education provided in collaboration with Special Olympics North Carolina's community-based healthcare partners.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Special Olympics North Carolina exceeded some outcomes and is on pace with others. Projected outcomes and results are as follows:

1) 4,500 people with intellectual disabilities who register as new athletes will engage in a behavioral shift that incorporates physical activity into their lifestyles: 1,075 new athletes registered during Q1 and began training in sports, representing a shift to active living. 2) Improved aspects of health and wellness for 60% of participating athletes based on their participation in year-round sports training and competition opportunities: While the sampling was small due to the time of year, some athletes did respond to an impact survey during Q1, and among this group, 77% reported some level of physical health improvement, notably an increase in frequency of physical activity (62%). 3) Improved aspects of emotional health and wellbeing for at least 60% of participating athletes through coach mentoring and engagement with community volunteers contributing to happiness, confidence and socialization: Among a small sampling of athletes responding to the Special Olympics impact survey in Q1, all athletes noted some aspect of improved emotional health, primarily, increased social connectedness (84%) and increased self-confidence and happiness (92%). 4) Increased understanding of people with intellectual disabilities for at least 70% of the general population, based on training and experience in their coaching and volunteer roles: Among a small sampling of volunteers who completed a volunteer impact survey in Q1, 83% noted increased understanding of the population of people with intellectual disabilities as a result of their volunteer experiences. Importantly, 30% of those responding were first-time volunteers, which demonstrates Special Olympics North Carolina's ability to continually reach people in the community and educate them about the skills and value of people with intellectual disabilities. 5) 10,000 athletes annually benefit from increased healthcare accessibility through health programming outputs (health education, sports physicals and/or health screenings): 195 athletes participated in health education and received sports physicals during the Special Olympics North Carolina Equestrian Tournament in September delivered in partnership with the following providers: Polk County Department of Health and Human Services, NC Department of Health and Human Services, Duke University- Department of Nursing, and Blue Ridge Health.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Special Olympics North Carolina utilized all evaluation methods noted in the Scope of Work, measuring the new athlete outreach number based on registration entered into the organization's Games Management System database (GMS). The GMS was also used to track athlete participation in health education and screenings at the equestrian tournament and this was in turn entered into a national Special Olympics reporting system. The percentage of athletes reporting improved aspects of health was measured using an online impact survey delivered using the Survey Monkey platform. This survey was also used to measure levels of understanding of the population of people with intellectual disabilities among volunteers. New coach certifications awarded were measured through coach training rosters entered into Special Olympics North Carolina's coach database. The number of new community volunteers registered and trained was measured through the organization's volunteer database (both Volunteer Local and GMS). The number of competition opportunities provided statewide was tracked through the GMS, based on local volunteer leadership reporting.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 10,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Sport/event facilities, Meals, Awards,uniforms	\$ 76,511.00	\$
Total Expenses:	\$ 86,511.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 10,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$ 76,511.00	\$
Total Expenses:	\$ 86,511.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Special Olympics North Carolina
Recipient Tax ID #	56-1149607
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	FY24 Q3
Report Completion Date:	April 15, 2024
Preparer of This Report:	Amy P. Johnson

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During third quarter, athletes trained weekly in their choice of winter sports including Alpine skiing, snowboarding, ice skating and cheerleading. Two Alpine skiing and snowboarding clinics were offered at Appalachian Ski Mountain in Blowing Rock, NC. Additionally, athletes statewide began training in spring sports, practicing weekly in preparation for Spring Games competition events that will be hosted in communities throughout the state in April and May. Beyond sports opportunities organized by local, county-based volunteer leadership, Special Olympics North Carolina hosted a Southeast Region Winter Games event for Special Olympics athletes representing North Carolina, Florida, Georgia, Tennessee and South Carolina, and a state-level Cheerleading Tournament in Pittsboro, NC. Fitness training complementing sports activity resumed for the spring season, beginning March 11. Participants have been provided a fitness playbook including exercise instruction, health education, weekly progress trackers, and access to complementary live, virtual workouts with three sessions offered weekly, tailored to both school-aged and adult athletes. One session is offered every Tuesday evening, while the other two sessions are provided during the school day for elementary and middle-high school students respectively. Additional video resources are available as bonus material for athletes to participate in on their own. More than 6,000 students including nearly 4,000 athletes are participating in fitness training this spring. Building on the health programming that is important to every athlete's sport participation experience, Special Olympics North Carolina has been able to offer health events, providing health education, screenings and exams for athletes during both competition and stand-alone events. During the Special Olympics Southeast Region Winter Games, Special Olympics North Carolina, in collaboration with Appalachian State University School of Nutrition Sciences, provided screenings across two Special Olympics Healthy Athletes disciplines: Podiatry, including screenings to evaluate ankles, feet, lower extremity biomechanics, and proper shoe and sock gear to participating athletes; and Health Promotion, providing athletes with education and resources for healthy life choices including sun safety, tobacco cessation, and healthy diet. Additionally, Special Olympics North Carolina provided stand-alone MedFest events in Harnett, Robeson and Mecklenburg counties in partnership with Campbell University Public Health and Physician Assistant program, Atrium Health, and Pembroke University School of Nursing. During the events, 130 athletes received a no-cost physical exam, which directly correlates to outreach efforts as individuals must obtain a physical exam as part of the athlete registration process. By providing this service, Special Olympics North Carolina not only increases health care accessibility for a vulnerable and underserved population, but also helps to facilitate their access to a structured program of sports and physical activity for positive health impact. All activity was supported by community-based volunteers.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Special Olympics North Carolina made progress toward achievement of all objectives supported by the directed grant. Objectives and results are as follows:
1) Address risks of compromised health faced by people with intellectual disabilities with an outreach effort that identifies eligible individuals and registers them as Special Olympics athletes: During FY24 Q3, Special Olympics North Carolina reached 178 new individuals with intellectual disabilities and brought them into the Special Olympics program where they gained inclusion in structured physical activity through sports and fitness, complemented by health programming impacting health risks for the population. 2) Support physical activity for improved aspects of physical and mental health by providing community-based training in up to 20 sports at facilities statewide for new and current athletes: Special Olympics North Carolina worked closely with community-based partners throughout the state including schools, parks and recreation departments, group homes and other agencies to deliver Special Olympics training in many of its 20 sports offerings, primarily winter and spring sports including Alpine skiing, snowboarding, ice skating, cheerleading, track and field, powerlifting, swimming, gymnastics, softball, basketball and volleyball. 3) Support a network of 1,800 community-based coaches by providing 200 new coach training certifications qualifying volunteers to work alongside athletes: 1,831 coaches (including 35 new) were supported with new coach training and certification opportunities during Q3, with 82 new certifications awarded. Certifications were earned in the following sports/disciplines: track & field, basketball, bowling, gymnastics, powerlifting, swimming, volleyball, and "Coaching Special Olympics Athletes." 4) Provide training and orientation for 4,000 new community-based volunteers to support the athletes in their activities: 730 new volunteers were trained during Q3. 5) Provide 350 culminating local/county competition opportunities during the two-year project period, and 8 state-level competitions throughout the state for athletes completing minimum training requirements: During Q3, at least 10 culminating local-level competition opportunities were held across the sports of bowling, swimming, track & field, basketball and Unified kickball in counties throughout the state including New Hanover, Orange, Catawba, Davidson, Haywood, Pitt, Brunswick, Carteret and Lincoln counties. Additionally, a state-level cheerleading tournament was held in Pittsboro in March, and regional Alpine skiing, snowboarding and ice skating competitions were hosted in February. 6) Improve healthcare accessibility for the population with a provision of fitness programming and health education, and health screenings and exams: During Q3, athletes who attended the Southeast Region Winter Games had access to health education screenings provided in collaboration with Special Olympics North Carolina's community-based healthcare partners, and no-cost medical exams were provided at three separate local events in Harnett, Mecklenburg and Robeson counties.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Special Olympics North Carolina exceeded some outcomes and is on pace with others. Projected outcomes and results are as follows:

1) 4,500 people with intellectual disabilities who register as new athletes will engage in a behavioral shift that incorporates physical activity into their lifestyles: 178 new athletes registered during Q3 and began training in sports, representing a shift to active living. YTD total new athletes is 1,431. 2) Improved aspects of health and wellness for 60% of participating athletes based on their participation in year-round sports training and competition opportunities: Athletes who have responded to an impact survey so far during this fiscal year (Q1-Q3) have indicated health improvement as follows: 82% reported some level of physical health improvement, notably, increases in strength and frequency of physical activity (38% and 34% respectively). 3) Improved aspects of emotional health and wellbeing for at least 60% of participating athletes through coach mentoring and engagement with community volunteers contributing to happiness, confidence and socialization: Among a sampling of athletes responding to the Special Olympics impact survey across Quarters 1-3, 97% of athletes noted some aspect of improved emotional health, primarily, increased happiness (64%), and increased self-confidence (34%). 4) Increased understanding of people with intellectual disabilities for at least 70% of the general population, based on training and experience in their coaching and volunteer roles: Among a small sampling of volunteers who completed a volunteer impact survey during Q1-Q3, 79% noted increased understanding of the population of people with intellectual disabilities as a result of their volunteer experiences. Importantly, 43% of those responding were first-time volunteers, which demonstrates Special Olympics North Carolina's ability to continually reach people in the community and educate them about the skills and value of people with intellectual disabilities. 5) 10,000 athletes annually benefit from increased healthcare accessibility through health programming outputs (health education, sports physicals and/or health screenings): 3,828 athletes participated in health education in Q3, and 130 athletes received health screenings and/or sports physicals during Special Olympics North Carolina events in partnership with the following providers: Campbell University Public Health and Physician assistant program, Atrium Health, and Pembroke University School of Nursing NC Department of Health and Human Services, Duke University- Department of Nursing, and Blue Ridge Health.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Special Olympics North Carolina utilized all evaluation methods noted in the Scope of Work, measuring the new athlete outreach number based on registration entered into the organization's Games Management System database (GMS). The GMS was also used to track athlete participation in health education and screenings at the Winter Games, and this was in turn entered into a national Special Olympics reporting system. The percentage of athletes reporting improved aspects of health was measured using an online impact survey delivered using the Survey Monkey platform. This survey was also used to measure levels of understanding of the population of people with intellectual disabilities among volunteers. New coach certifications awarded were measured through coach training rosters entered into Special Olympics North Carolina's coach database. The number of new community volunteers registered and trained was measured through the organization's volunteer database (both Volunteer Local and GMS). The number of competition opportunities provided statewide was tracked through the GMS, based on local volunteer leadership reporting.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	250,000.00	250,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 15,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Sport/event facilities, Meals, Awards,uniforms	\$ 50,000.00	\$
Total Expenses:	\$ 65,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 40,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Use of sport facilities; awards; uniforms	\$ 150,000.00	\$
Total Expenses:	\$ 190,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	Special Olympics North Carolina
Recipient Tax ID #	56-1149607
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	FY24 Q4
Report Completion Date:	July 15, 2024
Preparer of This Report:	Amy P. Johnson

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

During fourth quarter, Special Olympics North Carolina continued its outreach efforts, reaching more than 1,500 new athletes and engaging them in fitness, sport and health programming alongside their participating peers. Athletes trained weekly in their choice of spring sports including track & field, swimming, bowling, gymnastics, powerlifting, volleyball and basketball with the support of volunteer coaches across the state. This quarter represents the height of Special Olympics activity as culminating Spring Games competitions were executed with the support of county-based volunteer leadership throughout the state, and the largest state-level competition of the year (Summer Games) was hosted in Raleigh, Cary and Holly Springs. Additionally, Several multi-county competition opportunities were orchestrated by volunteers as were a number of Unified Sports experiences at the school level, bringing students with and without intellectual disabilities together for inclusive opportunities. Special Olympics North Carolina strives to continually increase opportunity for sports participation for children and adults with intellectual disabilities in the communities where they live, while also supporting showcase experiences at regional and state levels, following the model of mainstream sports. Beyond sports opportunities, supplementary fitness training and health education continued through the spring season. Participants were provided a fitness playbook including exercise instruction, health education, weekly progress trackers, and access to complementary live, virtual workouts with two weekly sessions offered—one to accommodate school-aged athletes, and the other for adults. Additional video resources were made available as bonus material for athletes to participate in on their own. More than 6,300 athletes participated in fitness training this spring. Building on the health programming that is important to every athlete's sport participation experience, Special Olympics North Carolina presented a Healthy Athletes event in conjunction with the Summer Games, offering health education and screenings for athletes across healthy living, dental, vision, hearing and fitness disciplines in collaboration with community-based health partners. These opportunities contributed to increased health care accessibility for the vulnerable and underserved population of people with intellectual disabilities.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

Special Olympics is on track to meet or exceed objectives outlined for the two-year project funded by the NCDHHS. Objectives and results are as follows:

1) Address risks of compromised health faced by people with intellectual disabilities with an outreach effort that identifies eligible individuals and registers them as Special Olympics athletes: During FY24 Q4, Special Olympics North Carolina reached 1,519 new individuals with intellectual disabilities and brought them into the Special Olympics program where they gained inclusion in structured physical activity through sports and fitness, complemented by health programming impacting health risks for the population. 2) Support physical activity for improved aspects of physical and mental health by providing community-based training in up to 20 sports at facilities statewide for new and current athletes: Special Olympics North Carolina worked closely with community-based partners throughout the state including schools, parks and recreation departments, group homes and other agencies to deliver Special Olympics training in many of its 20 sports offerings, primarily spring and summer sports: track and field, powerlifting, swimming, gymnastics, softball, basketball and volleyball. 3) Support a network of 1,800 community-based coaches by providing 200 new coach training certifications qualifying volunteers to work alongside athletes: 1,835 coaches (including 4 new) were supported with new coach training and certification opportunities during Q4. 4) Provide training and orientation for 4,000 new community-based volunteers to support the athletes in their activities: 2,056 new volunteers were trained during Q4, translating to a total of 4,812 for the year, which exceeds the two-year project goal. 5) Provide 350 culminating local/county competition opportunities during the two-year project period, and 8 state-level competitions throughout the state for athletes completing minimum training requirements: During Q4, at least 119 culminating local-level competition opportunities were held across the sports of bowling, swimming, track & field, basketball and Unified kickball in 72 counties throughout the state; a total of 177 events were held throughout FY24, which is on track for the two-year goal. 6) Improve healthcare accessibility for the population with a provision of fitness programming and health education, and health screenings and exams: During Q4, athletes were provided daily fitness and health education through Special Olympics North Carolina's structured fitness program offered at school and community levels with the option to complete activities virtually and from home with the support of a fitness playbook. Health topics focused on nutrition, healthy cooking, hydration, stress management, mindfulness and sun safety. Additionally, athletes who attended the Summer Games had access to no-cost health screenings provided in collaboration with community-based healthcare partners. Special Olympics Health disciplines offered: Special Smiles, Opening Eyes, Health Promotion, FUNfitness, and Healthy Hearing. A total of 573 screenings were provided across these disciplines, with 82 referrals made for follow-up care. On site, Special Olympics health partners were able to provide 20 athletes with prescriptions for glasses.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Special Olympics North Carolina exceeded some outcomes and is on pace with others. Projected outcomes and results are as follows:

1) 4,500 people with intellectual disabilities who register as new athletes will engage in a behavioral shift that incorporates physical activity into their lifestyles: 1,519 new athletes registered during Q4 and began training in sports, representing a shift to active living. YTD total new athletes is 2,950. 2) Improved aspects of health and wellness for 60% of participating athletes based on their participation in year-round sports training and competition opportunities: Athletes who have responded to an impact survey during this fiscal year (Q1-Q4) have indicated health improvement as follows: 82% reported some level of physical health improvement, notably, increases in strength and frequency of physical activity (48% and 42% respectively). 3) Improved aspects of emotional health and wellbeing for at least 60% of participating athletes through coach mentoring and engagement with community volunteers contributing to happiness, confidence and socialization: Among a sampling of athletes responding to the Special Olympics impact survey across Quarters 1-4, 96% of athletes noted some aspect of improved emotional health, primarily, increased happiness (65%), and increased self-confidence (48%). 4) Increased understanding of people with intellectual disabilities for at least 70% of the general population, based on training and experience in their coaching and volunteer roles: Among a sampling of volunteers who completed a volunteer impact survey during Q1-Q4, 76% noted increased understanding of the population of people with intellectual disabilities as a result of their volunteer experiences. Importantly, 53% of those responding were first-time volunteers, which demonstrates Special Olympics North Carolina's ability to continually reach people in the community and educate them about the skills and value of people with intellectual disabilities. 5) 10,000 athletes annually benefit from increased healthcare accessibility through health programming outputs (health education, sports physicals and/or health screenings): Nearly 10,100 athletes participated in health education during FY24 and 703 athletes received health screenings and/or sports physicals during Special Olympics North Carolina events in partnership with the following providers: Campbell University Public Health and Physician assistant program, Atrium Health, and Pembroke University School of Nursing, NC Department of Health and Human Services, Duke University- Department of Nursing, Blue Ridge Health, Duke University Eye Center, UNC Audiology, UNC Physical Therapy, Tuft's University, NC State University, and StarKey Cares.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Special Olympics North Carolina utilized all evaluation methods noted in the Scope of Work, measuring the new athlete outreach number based on registration entered into the organization's Games Management System database (GMS). The GMS was also used to track athlete participation in health education and screenings at the Winter Games, and this was in turn entered into a national Special Olympics reporting system. The percentage of athletes reporting improved aspects of health was measured using an online impact survey delivered using the Survey Monkey platform. This survey was also used to measure levels of understanding of the population of people with intellectual disabilities among volunteers. New coach certifications awarded were measured through coach training rosters entered into Special Olympics North Carolina's coach database. The number of new community volunteers registered and trained was measured through the organization's volunteer database (both Volunteer Local and GMS). The number of competition opportunities provided statewide was tracked through the GMS, based on local volunteer leadership reporting.

5. Provide a summary of expenditures during the reporting period (quarter).

Expenditure Category	Amount of Expenditure	Amount of Expenditure
	SFY 2023-2024	SFY 2024-2025
Amount of Appropriation	250,000.00	250,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Sport/event facilities, Meals, Awards,uniforms	\$ 60,000.00	\$
Total Expenses:	\$ 60,000.00	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 40,000.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify): Use of sport facilities; awards; uniforms	\$ 190,000.00	\$
Total Expenses:	\$ 230,000.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	St. Gerard House
Recipient Tax ID #	45-0948760
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	July 1 - September 30
Report Completion Date:	April 5, 2024
Preparer of This Report:	Julia Buchanan / Brad Ward

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Grotto Therapeutic Center provides intensive, 1:1 early intervention and small group therapy for children aged 3-7 and functional academic and life skills therapy for youth aged 8-21 using ABA. July-Sept 2023, the Grotto Therapeutic Center served 31 clients including seven (7) new clients enrolled. Appropriated funds financially supported a portion of the salaries of clinical staff and supervising program managers, development, compliance training for clinical staff, a portion of data tracking software, supplies, technology, and therapeutic space expenses.

The Feed The Need program is a prevocational training program for teens and young adults with ASD and similar behavioral needs. July - September 2023, 18 participants went on 67 community outings, completed lessons focused on hygiene/self care, problem solving, team building and relationships. Four (4) volunteers worked within the program helping participants with cooking, gardening, and art. Appropriated funds provide a portion of the salaries of a Program Coordinator, Program Manager and multiple Behavioral Technicians. Program supplies, staff training, and annual rent for program space will be partially funded.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The Grotto Therapeutic Center offers clients opportunities for partial or full inclusion with neuro-typical peers in mainstream school settings as they are ready. July - September, 2023, SGH discharged five (5) clients after successful program completion. SGH continues to reduce barrier behaviors and increase daily living skills discovering incredible potential for better outcomes for each participant give training and opportunities.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Grotto Therapeutic Center Outputs & Outcomes: \$15,000 in allocation was applied to program expense support for 31 clients and 28 caregivers. 193 hours of caregiver training were provided. 100% of Clients received an annual comprehensive assessment to monitor progress and guide treatment goals, 100% of RBTs received a 1:1 evaluation by clinical staff, 100% of RBTs received supervision for at least 5% of their working hours by a BCBA or BCaBA.

Outcomes: 100% of students improved at least five measures (skill acquisition and reduction of maladaptive behavior) of their individualized goals based on data collected through Central Reach software, 100% of clinical staff had access to 5 hours of behavior training monthly, 92.1% of caregivers reported satisfaction with services.

Feed The Need Outputs & Outcomes: 100% of participants received program fee reduction, 100% of participants will receive training and development of prevocational skills geared towards job placement.

Outcomes: 100% of participants will show improvement on at least 2 of 3 PCP goals, 90% of parents/caregivers expressed satisfaction with services provided, 40% of participants' time included community integration to encourage participants to become active members of their community.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Standards met as outlined in the scope of work:

The Grotto program is individualized to each person served and objective performance goals are developed, tracked and managed in real time by Central Reach; a skills and behavior cloud-based software. Results are reviewed daily and shared with staff and parents.

Systematic weekly training for parents/caregivers. Extensive ABA and compliance training for clinical staff including workforce development.

Our Feed The Need staff assist participants by promoting maximum involvement in the community while developing natural supports in integrated settings. Progress is tracked and monitored by individualized data and reported visually through sheets, graphs, and program surveys. FTN has completed the CARF accreditation process in its history.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,845.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 9,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 45,845.25	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
	Amount of Appropriation	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,845.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 9,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 45,845.25	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	St. Gerard House
Recipient Tax ID #	45-0948760
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	October - December 2023
Report Completion Date:	April 5, 2024
Preparer of This Report:	Julia Buchanan / Brad Ward

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Grotto Therapeutic Center provides intensive, 1:1 early intervention and small group therapy for children aged 3-7 and functional academic and life skills therapy for youth aged 8-21 using ABA. Oct-Dec 2023, the Grotto Therapeutic Center served 28 clients including four (4) new clients enrolled. Appropriated funds financially supported a portion of the salaries of clinical staff and supervising program managers, development, compliance training for clinical staff, a portion of data tracking software, supplies, technology, and therapeutic space expenses.

The Feed The Need program is a prevocational training program for teens and young adults with ASD and similar behavioral needs. July - September 2023, 12 participants went on 48 community outings, completed lessons focused on manners, self management, and navigating the community. Two (2) volunteers worked within the program helping participants with cooking and art. Appropriated funds provide a portion of the salaries of a Program Coordinator, Program Manager and multiple Behavioral Technicians. Program supplies, staff training, and annual rent for program space will be partially funded.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The Grotto Therapeutic Center offers clients opportunities for partial or full inclusion with neuro-typical peers in mainstream school settings as they are ready. Oct - Dec, 2023, SGH discharged one (1) client after successful program completion. SGH continues to reduce barrier behaviors and increase daily living skills discovering incredible potential for better outcomes for each participant give training and opportunities.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Grotto Therapeutic Center Outputs & Outcomes: \$15,000 in allocation was applied to program expense support for 28 clients and 28 caregivers. 193 hours of caregiver training were provided. 100% of Clients received an annual comprehensive assessment to monitor progress and guide treatment goals, 100% of RBTs received a 1:1 evaluation by clinical staff, 100% of RBTs received supervision for at least 5% of their working hours by a BCBA or BCaBA.

Outcomes: 100% of students improved at least five measures (skill acquisition and reduction of maladaptive behavior) of their individualized goals based on data collected through Central Reach software, 100% of clinical staff had access to 5 hours of behavior training monthly, 94.71% of caregivers reported satisfaction with services.

Feed The Need Outputs & Outcomes: 100% of participants received program fee reduction, 100% of participants will receive training and development of prevocational skills geared towards job placement.

Outcomes: 100% of participants will show improvement on at least 2 of 3 PCP goals, 95.83% of parents/caregivers expressed satisfaction with services provided, 40% of participants' time included community integration to encourage participants to become active members of their community.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Standards met as outlined in the scope of work:

The Grotto program is individualized to each person served and objective performance goals are developed, tracked and managed in real time by Central Reach; a skills and behavior cloud-based software. Results are reviewed daily and shared with staff and parents.

Systematic weekly training for parents/caregivers. Extensive ABA and compliance training for clinical staff including workforce development.

Our Feed The Need staff assist participants by promoting maximum involvement in the community while developing natural supports in integrated settings. Progress is tracked and monitored by individualized data and reported visually through sheets, graphs, and program surveys. FTN has completed the CARF accreditation process in its history.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,845.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 9,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 45,845.25	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>	183,381.00	183,381.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 73,690.50	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 18,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 91,690.50	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	St. Gerard House
Recipient Tax ID #	450948760
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	January 1, 2024 - March 31, 2024
Report Completion Date:	April 5, 2024
Preparer of This Report:	Julia Buchanan / Brad Ward

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Grotto Therapeutic Center provides intensive, 1:1 early intervention and small group therapy for children aged 3-7 and functional academic and life skills therapy for youth aged 8-21 using ABA. During Q1-FY24, the Grotto Therapeutic Center served 29 clients including two (2) new clients enrolled. Appropriated funds financially supported a portion of the salaries of clinical staff and supervising program managers, development, compliance training for clinical staff, a portion of data tracking software, supplies, technology, and therapeutic space expenses.

The Feed The Need program is a prevocational training program for teens and young adults with ASD and similar behavioral needs. During Q1-FY24, 11 participants went on 52 community outings, completed lessons focused on safety, self care, and relationships. Three (3) volunteers worked within the program helping participants with cooking, clay work, and social skills. Appropriated funds provide a portion of the salaries of a Program Coordinator, Program Manager and multiple Behavioral Technicians. Program supplies, staff training, and annual rent for program space will be partially funded.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The Grotto Therapeutic Center offers clients opportunities for partial or full inclusion with neuro-typical peers in mainstream school settings as they are ready. In Q1-2024, SGH discharged four (4) clients after successful program completion. SGH continues to reduce barrier behaviors and increase daily living skills discovering incredible potential for better outcomes for each participant give training and opportunities.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Grotto Therapeutic Center Outputs & Outcomes: \$15,000 in allocation was applied to program expense support for 29 clients. 200.5 hours of caregiver training were provided. 100% of Clients received an annual comprehensive assessment to monitor progress and guide treatment goals, 100% of RBTs received a 1:1 evaluation by clinical staff, 100% of RBTs received supervision for at least 5% of their working hours by a BCBA or BCaBA.

Outcomes: 100% of students improved at least five measures (skill acquisition and reduction of maladaptive behavior) of their individualized goals based on data collected through Central Reach software, 100% of clinical staff had access to 5 hours of behavior training monthly, 92.7% of caregivers reported satisfaction with services.

Feed The Need Outputs & Outcomes: 100% of participants received program fee reduction, 100% of participants will receive training and development of prevocational skills geared towards job placement.

Outcomes: 100% of participants will show improvement on at least 2 of 3 PCP goals, 93.75% of parents/caregivers expressed satisfaction with services provided, 40% of participants' time included community integration to encourage participants to become active members of their community.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Standards met as outlined in the scope of work:

The Grotto program is individualized to each person served and objective performance goals are developed, tracked and managed in real time by Central Reach; a skills and behavior cloud-based software. Results are reviewed daily and shared with staff and parents.

Systematic weekly training for parents/caregivers. Extensive ABA and compliance training for clinical staff including workforce development.

Our Feed The Need staff assist participants by promoting maximum involvement in the community while developing natural supports in integrated settings. Progress is tracked and monitored by individualized data and reported visually through sheets, graphs, and program surveys. FTN has completed the CARF accreditation process in its history.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,845.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 9,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 45,845.25	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 110,535.75	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 27,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 137,535.75	\$ 0.00

If there are any questions, please contact the Contract Administrator.

QUARTERLY STATUS REPORT
Please use this reporting template for each of the quarterly reports

Recipient Name:	St. Gerard House
Recipient Tax ID #	450948760
Project/Activity Title:	Directed Grant
Reporting Period (Quarter):	April 1, 2024 - June 30, 2024
Report Completion Date:	July 10, 2024
Preparer of This Report:	Julia Buchanan / Brad Ward

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

The Grotto Therapeutic Center provides intensive, 1:1 early intervention and small group therapy for children aged 3-7 and functional academic and life skills therapy for youth aged 8-21 using ABA. During Q2-FY24, the Grotto Therapeutic Center served 28 clients including 1 new clients enrolled. Appropriated funds financially supported a portion of the salaries of clinical staff and supervising program managers, development, compliance training for clinical staff, a portion of data tracking software, supplies, technology, and therapeutic space expenses.

The Feed The Need program is a prevocational training program for teens and young adults with ASD and similar behavioral needs. During Q2-FY24, 12 participants went on 92 community outings, completed lessons focused on safety, self care, and relationships. Three (3) volunteers worked within the program helping participants with cooking, clay work, and social skills. Appropriated funds provide a portion of the salaries of a Program Coordinator, Program Manager and multiple Behavioral Technicians. Program supplies, staff training, and annual rent for program space will be partially funded.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The Grotto Therapeutic Center offers clients opportunities for partial or full inclusion with neuro-typical peers in mainstream school settings as they are ready. In Q2-2024, SGH discharged 3 clients after successful program completion. SGH continues to reduce barrier behaviors and increase daily living skills, discovering incredible potential for better outcomes for each participant.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

Grotto Therapeutic Center Outputs & Outcomes: \$15,000 in allocation was applied to program expense support for 28 clients. 179 hours of caregiver training were provided. 100% of Clients received an annual comprehensive assessment to monitor progress and guide treatment goals, 100% of RBTs received a 1:1 evaluation by clinical staff, 100% of RBTs received supervision for at least 5% of their working hours by a BCBA or BCaBA.

Outcomes: 100% of students improved at least five measures (skill acquisition and reduction of maladaptive behavior) of their individualized goals based on data collected through Central Reach software, 100% of clinical staff had access to 5 hours of behavior training monthly, 87% of caregivers reported satisfaction with services.

Feed The Need Outputs & Outcomes: 100% of participants received program fee reduction, 100% of participants will receive training and development of prevocational skills geared towards job placement.

Outcomes: 100% of participants will show improvement on at least 2 of 3 PCP goals, 93.1% of parents/caregivers expressed satisfaction with services provided, greater than 40% of participants' time included community integration to encourage participants to become active members of their community.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Standards met as outlined in the scope of work:

The Grotto program is individualized to each person served and objective performance goals are developed, tracked and managed in real time by Central Reach; a skills and behavior cloud-based software. Results are reviewed daily and shared with staff and parents.

Systematic weekly training for parents/caregivers. Extensive ABA and compliance training for clinical staff including workforce development.

Our Feed The Need staff assist participants by promoting maximum involvement in the community while developing natural supports in integrated settings. Progress is tracked and monitored by individualized data and reported visually through sheets, graphs, and program surveys. FTN has completed the CARF accreditation process in its history.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
	<u>Amount of Appropriation</u>	
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 36,845.25	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 9,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 45,845.25	\$ 0.00

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	SFY 2023-2024	SFY 2024-2025
<i>Amount of Appropriation</i>		
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$ 147,381.00	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$ 36,000.00	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$ 183,381.00	\$ 0.00

If there are any questions, please contact the Contract Administrator.

ATTACHMENT D
REPORTING REQUIREMENTS & TEMPLATES
QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Alliance of YMCAs, Inc.
Recipient Tax ID #	87-4278459
Project/Activity Title:	Teen Mental Health – Nurturing Youth Resilience
Reporting Period (Quarter):	July 1, 2023 – December 31, 2023
Report Completion Date:	January 12, 2024-revised January 30, 2024
Preparer of This Report:	Michele McKinley

Were grant funds expended during this reporting period? X Yes No

Do you certify that all expenses to date have been submitted for this grant? X Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? X Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Completed development of the grant application portal (through our vendor WizeHive and utilizing its Zengine platform) for subrecipients (NC YMCA associations) to apply for funds from the Alliance in the 2 year-grant program.
- Developed the capacity building grant program details, including requirements for NC YMCAs to be funded.
- Hosted two informational webinars for YMCA associations; these included information about the YMCA of the USA Mental Health Community Care Model and an innovation process that Ys could utilize to determine how they would approach expanding or launching teen programming with an intentional, consistent and repetitive focus on teen mental health. Webinars also provided information on existing YMCA teen programs and strategies that could be launched at Ys, as some Ys do not currently have teen programming.
- Hosted office hours to answer questions about the grant opportunity and requirements of funding.
- Connected with Ruby Brown-Herring, a consultant for Governor Cooper's initiative around teen mental health across the state, to learn about offering Youth Mental Health First Aid (YMHFA) courses to YMCA staff across the state; more than 50 Y were certified during this period as a result; more to come.
- Worked with Ruby Brown-Herring to secure slots for five YMCA Youth Development leaders to participate in YMHFA "train the trainer" certification in January 2024; ensured those staff persons had been certified in YMHFA to be eligible to serve as trainers. Once certified as trainers, these staff will train staff at their own Ys in YMHFA as well as other Ys in the state (and local partners if they wish).
- Formed a Teen Mental Health Advisory Council that will provide expertise, resources and a variety of perspectives; council will have initial meeting in January 2024.
- Began planning in-person Teen Mental Health Kickoff meeting for March 2024 for YMCA staff across the state.
- Worked with YMCA of Greater Charlotte on opportunities to replicate the Teen Mental Health Resources Hub located on its website on the Alliance website for Ys across the state to link to and to provide an opportunity for banners, yard signs, etc. to be printed with a QR code to access that online resource (available by end of February 2024 at latest) to help increase awareness about destigmatizing mental health and about resources available for youth and parents
- Posted resources on the Alliance website in a private area for Y staff, such as recordings and slide decks of webinars, information on Youth Mental Health First Aid courses and registration, resources from NAMI NC, etc.
- Purchased contract with Hello Insight to provide NC YMCAs with a tool to measure Social Emotional Learning (SEL) capacity growth, and YMCAs signed memorandum of agreement about the use of the tool and the requirement to collect the data in a timely manner.
- Launched access for YMCAs to Hello Insight platform so that they could begin the process of collecting SEL pre-assessment data to learn about the current capacity and needs of the youth aged 5 to 10 the Ys are serving; the Ys' use of SEL as a positive youth development tool encourages and increases healthy behaviors, protective factors and resilience. Ys were provided with a deadline in January 2024 to collect the pre-assessment data and informed of May 2024 deadline for collecting post-assessment data. YMCAs were informed they would have access to Hello Insight's tools for ages 11+ upon award of their teen mental health grant; we anticipate those pre-assessments launching in February/March 2024.
- Worked with contract attorneys to write contract agreements for YMCAs to sign to ensure compliance with all legal requirements of grant program.
- Updated Zoom account to allow for webinar capacity.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

The objectives in our Scope of Work begin March 1 and beyond.

- YMCAs have from Jan 4-19 to submit an application for funding (ie committing to supporting youth aged 11-18 with consistent intentional mental health programming).
- YMCAs are working on forming mental health partnerships; they will outline this in their grant application.
- At least 50 YMCA staff have been trained to date in YMHA; our objective is 120 by June 30, 2024.
- Five Y staff will be trained as trainers in YMHA in January 2024; our goal is 9 trained by June 2024.
- We are not requiring YMCAs to train teens aged 15-18 in Teen Mental Health First Aid, but we have shared information about that opportunity for having that trained delivered at their Y/in their community by NC DHHS consultant Ruby Brown-Herring (or others certified to do so); we hope at least five teens in the state, whether staff at YMCAs who are teens, or teens in the community served by the Y, will take the course by Dec. 31, 2024.
- Referrals to mental health providers will begin after YMCAs are awarded the grant funding and launch their teen programs.
- Teens and staff will increase SEL capacity as measured by Hello Insight; we will have first measurements in May 2024.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

We do not currently have an update on expected results; there is no change. We still expect the following results:

YMCA youth development staff will have grown their capacity to support youth ages 11-18 in identifying potential mental health issues, will have greater capacity to support resilience in youth through training and utilization of character development and SEL techniques.

Youth development staff will also grow in their own social emotional development, and exhibit greater capacity and feelings of competency in SEL supports for the youth they serve.

YMCAs will have trained staff in Youth Mental Health First Aid training, and the Ys will have sustained capacity for training for additional staff beyond the grant period as youth development leadership staff in diverse geographic regions across the state will be certified as Youth Mental Health First Aid trainer. Ys will have the capacity to continue to train staff as staff turnover and promotions result in new staff working in youth programs.

YMCA Associations will utilize a social media campaign developed for the Charlotte YMCA to offer support to teens in their communities, directing teens to suicide prevention and acute intervention opportunities through 988lifeline.org.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

It is too early for an update on the performance measures since the grant applications are just opening this month. The only update is at least 50 staff Y staff have been trained in YMHA since fall 2023.

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of expenditure</u> <u>SFY 2023-2024</u>	<u>Amount of expenditure</u> <u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$2172.96	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	52,628.75	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$54,801.71	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u> <u>SFY 2023-2024</u>	<u>Amount of Expenditure</u> <u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing):	\$2172.96	\$
Supplies and Materials Expenses (e.g., office supplies):	\$	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	52628.75	\$
Other Expenses (Specify):	\$	\$
Total Expenses:	\$54,801.71	\$

If there are any questions, please contact the Contract Administrator.

ATTACHMENT D
REPORTING REQUIREMENTS & TEMPLATES
QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Alliance of YMCAs, Inc.
Recipient Tax ID #	87-4278459
Project/Activity Title:	Teen Mental Health – Nurturing Youth Resilience
Reporting Period (Quarter):	January 1-March 31-2024
Report Completion Date:	April 12, 2024
Preparer of This Report:	Michele McKinley

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

1. Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.

- Hosted information webinar Jan 4, 2024, informing YMCAs how to apply for the grant in the WizeHive portal and an info webinar on Feb. 20 for funded YMCAs to provide guidance on next steps and how to report for first monthly report/reimbursement request deadline (March 8).
- Launched grant application for YMCAs to apply for funds via WizeHive grant portal.
- Held 3 Teen Mental Health Advisory Council meetings, discussing purpose of group and planning a Kickoff Meeting to convene grantees and support them with resources, connections, etc.
- Discussed Teen Mental Health First Aid Course questions with Ruby Brown-Herring (consultant to the state) to be able to advise YMCAs about this opportunity.
- Talked with Whole Health Sport about Youth Mental Health First Aid (YMHFA) course for sports coaches and athletics staff to share with YMCAs; shared this via email to YMCAs and in Alliance newsletter
- Reviewed and approved grant applications, including getting funding agreements signed by YMCAs (subgrantees). YMCAs formally began their work on this grant.
- Confirmed participation of 5 YMCA staff in 3-day train the trainer course for YMHFA offered at no cost by the state; staff were trained.
- Planned and hosted Teen Mental Health Kickoff Grant Meeting at YMCA Blue Ridge Assembly for grantees March 20, 2024, with about 70 participants from 25 YMCA associations. Advisory Council members and consultant Megan Hoyt presented.
- Hired consultant (Megan Hoyt) to facilitate a session at Teen Mental Health Grant Kickoff about how Ys can move forward with their grant activities.
- Reviewed first monthly report/reimbursement requests and reimbursed YMCAs for expenses through February 2024. Going forward, Ys will report a month at a time for the prior month's activities and expenses paid.
- Invited YMCAs to attend free training offered by YMCA of the USA in Raleigh in April re: the Y's Mental Health Community of Care Model and how to build the culture of positive mental health within Ys.
- Issued March 20 press release statewide about the Ys' work on teen mental health and the new Teen Mental Health Resource Hub on Alliance website.
- Completed installation of Teen Mental Health Resource Hub on Alliance website (<https://www.ncymcas.org/YMCATeenMentalHealth>); Charlotte YMCA had created this last fall and shared with the Alliance to provide access point for all Ys and other organizations in the state in one central online site.
- Printed and provided YMCA subgrantees with banners, posters, yard signs and fliers about the "Mental Health Has No Face" teen mental health destigmatization campaign; assets include QR linking to the Hub on the Alliance's website.
- Provided YMCA Teen Mental Health grant contacts and Marketing Communications staff with language to use on their websites, newsletters, social media re: the teen mental health work, the destigmatization campaign and the Hub.
- Worked with Ruby Brown-Herring, a consultant for Governor Cooper's initiative around teen mental health across the state, to provide additional YMHFA training dates to meet needs of Y staff at different times of the day than the courses the state was offering. Communicated with Ys about course offerings.
- Planned an April 4 information webinar about YMHFA and Teen Mental Health First Aid courses.
- Refined process and documentation of monthly reporting/reimbursement request and communicated that to YMCAs for their upcoming April 8 deadline to report March 2024 activities and expenses.

2. Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- **Accomplished objective:** 25 YMCA associations committed to supporting youth ages 11-18 with consistent and intentional mental health programing. (Goal was 20 of 25 associations by March 1, 2024.)
- **Accomplished objective:** 25 YMCA associations have established a collaborative agreement with a local mental health provider. (Goal was 20 of 25 Y association by Oct. 1, 2024)
- **Objective Update:** At least 115 YMCA staff have been trained in YMHFA- they are now certified to recognize the signs of teen mental health challenges and know how to respond appropriately. (Goal is 120 by June 30, 2024. Staff continue to sign up for training.)
- **Objective update:** We are seeking to have 9 youth development leaders trained as YMHFA trainers by June 30, 2024; 6 are trained to date. We are working to provide Ys with information on how to become trainers; the state is no longer offering this at no charge, but some Ys have budgeted for this. It may not be possible to train 9 by June.
- We are continuing to work towards our other objectives.

3. Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

YMCAs were approved for the grant funds in early February. Their work is in its early stages so it is early to see expected results but are on track as anticipated. For some Ys, their programming starts with the summer or the new school year in fall 2024.

YMCA youth development staff have grown in their capacity to support youth ages 11-18 in identifying potential mental health issues through completion of the YMHFA course.

Five staff have been trained as YMHFA trainers, which provides capacity within their Y associations and the state as a whole to sustain this work beyond the grant period.

YMCAs have received printed and digital assets to support their social media outreach on how they are supporting teens' mental health.

4. Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

It is early for performance measures for the YMCAs as many have just begun or are still working to hire a teen director, for example, to coordinate the work for their YMCA. Some Ys didn't seek reimbursement of any funds yet, nor have metrics to report on yet. We can report on the following performance measures at this time:

Output Measures

- TA provided to YMCAs: yes, via webinars and Teen Mental Health Grant Kickoff Meeting
- 6 staff trained as YMHFA trainers
- 115 staff trained in YMFHA
- No data yet on staff feelings of competency in SEL
- 100 social media posts/6 media relations exposures w/ 294,758 unique visitors to media website posts
- 0 teens trained in teen Mental Health First Aid (tMHFA)

Outcome Measures

- 242 of programs offered by Ys that incorporate mental health
- 1,656 of youth served in such programs
- 29 of referrals to mental health providers
- Improvement in Hello Insight scores for youth indicating SEL capacity growth—too soon to tell; this is not measured on a monthly or quarterly basis but is program related and for most of the Ys, they are not yet measuring SEL for the 11 to 18-year-olds they serve
- Improvement in staff confidence/capacity around SEL practices- same as above

5. Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of expenditure</u> <u>SFY 2023-2024</u>	<u>Amount of expenditure</u> <u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$957.43	\$
Supplies and Materials Expenses (e.g., office supplies):	\$15,510	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$859.69	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$ 0	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	13,493	\$
Other Expenses (Specify):	\$52,644.78	\$
Total Expenses:	\$83,464.90	\$

6. Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$3130.39	\$
Supplies and Materials Expenses (e.g., office supplies):	\$15,510	\$
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$859.69	\$
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0	\$
Property and Equipment Expenses (e.g., buildings and improvements):	\$0	\$
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$66,121.75	\$
Other Expenses (Specify):	\$52,644.78	\$
Total Expenses:	\$138,266.61	\$

If there are any questions, please contact the Contract Administrator.

ATTACHMENT D
REPORTING REQUIREMENTS & TEMPLATES
QUARTERLY STATUS REPORT

Please use this reporting template for each of the quarterly reports

Recipient Name:	North Carolina Alliance of YMCAs, Inc.
Recipient Tax ID #	87-4278459
Project/Activity Title:	Teen Mental Health – Nurturing Youth Resilience
Reporting Period (Quarter):	April 1-June 30, 2024- REVISION 3
Report Completion Date:	July 15, 2024
Preparer of This Report:	Michele McKinley

Were grant funds expended during this reporting period? Yes No

Do you certify that all expenses to date have been submitted for this grant? Yes No

Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract? Yes No

- **Provide a brief report of activities and accomplishments related to your Grant Project during this reporting period.**
- Continued monthly review of YMCAs' progress reports and reimbursement requests; disbursed funds to YMCAs. YMCAs report each month on the prior month's activities, progress on objectives and expenses. Reviewed March, April and May reports and reimbursed Ys for expenses.
- Hired consultant Megan Hoyt to support the Alliance's work statewide; focus is on supporting YMCAs with implementation and providing support for monthly technical assistance (TA) meetings with YMCA beneficiaries. Ms. Hoyt also established Office Hours once a month for Y staff; two Office Hours sessions were offered during this period.
- Supported YMCA staff in signing up for YMHFA courses offered through the state at no charge via NC DHHS and the UNC School of Social Work's Behavioral Health Springboard and served as liaison between the Ys and UNC to address questions about course enrollment and completion, and worked with UNC to add additional dates for Y staff to get certified.
- Hosted Teen Mental Health Advisory Council Meetings April 9 and May 21 on Zoom.
- Launched monthly TA meetings for YMCAs, held on Zoom on April 4, May 1, June 5
 - 1) April TA meeting focused on Youth Mental Health First Aid (YMHFA) and Teen Mental Health First Aid (tMHFA) courses for beneficiaries. All YMCAs funded for this work are required to train Youth Development staff in YMHFA—the course is designed for adults 18+ who work with youth. Some Ys are exploring the option to offer the tMHFA course, designed for 14-18 year olds.
 - 2) May TA meeting focused on strategies and tools for engaging teen voice, creating a teen conversation guide and using design thinking tools to gather insights from teens.
 - 3) June TA meeting focused on Social Emotional Learning (SEL) and how this supports mental health for children and teens and how YMCAs can utilize the Hello Insight tools for pre- and post-assessments to measure SEL growth among the teens aged 11-18 they are serving
- Participated in YUSA Mental Health Community Care Model training April 25-26; 30 North Carolina YMCA staff also participated. Provided logistical support to YUSA in offering a Train the Trainer course for the Mental Health Community Care Model training on April 24.
- Hosted Zoom meeting for YMCAs on options for training a tMHFA instructor and implementing the tMHFA course, either through NC DHHS and UNC, or through the National Council for Mental Well-being directly. Several Ys plan to pursue this.
- At NC Child's request, wrote article about the Y's work around teen mental health in May as part of Mental Health Awareness Month: <https://ncchild.org/nc-ymcas-launch-work-to-support-teen-mental-health/>; began preparing for a July presentation to NC Child's Parent Advisory Committee about the work.
- Provided YMCAs with social media graphics and content around elevating Mental Health Awareness Month for the month of May.
- Posted news articles on Alliance website, shared on social media and in statewide Alliance e-newsletter for YMCA staff about this work across the state, including:
 - <https://www.ncymcas.org/news/sandhills-ymca-hosts-resilience-film-screening-community-conversation>
 - <https://www.ncymcas.org/news/nc-ymcas-observe-mental-health-awareness-month-and-train-staff-community-care-model>
 - <https://www.ncymcas.org/news/supporting-lgbtq-teens-mental-health>
 - <https://www.ncymcas.org/news/y-staff-trained-youth-mental-health-first-aid>
 - <https://www.ncymcas.org/news/mental-health-community-care-y-0>
- Issued statewide press release about Mental Health Awareness Month and the Y's Mental Health Community Care Model on May 1, 2024.

- Presented at the state's Youth Mental Health First Aid/Teen Mental Health First Aid Summit in Greensboro on May 3, 2024 about the Y's emerging work around teen mental health.
- Hosted a meeting for Ys that plan to launch Hello Insight pre-assessments spring/early summer as to how to use the tool and collect assessments; scheduled an August meeting for Ys planning to launch Hello Insight assessments in the late summer/early fall.
- Coordinated with partner CGR Creative to develop landing pages for all YMCAs' websites about teen mental health resources and links to the Teen Mental Health Resource Hub on the Alliance website. Coordinated work with them to deploy Google Ad Grants campaigns for when people conduct Google searches around teen mental health topics; these searches are driven from the content developed for the teen mental health landing pages for the Ys' websites.
- Invited YMCA staff working on teen mental health to participate in the Alliance's upcoming Neighborhood Meetings in September; these regional gatherings (one on Sept. 10 in Lexington, NC and one on Sept 12 in Rocky Mount) will enable Y staff to participate in a peer meeting with others in their region of the state who are working on implementing teen mental health supports at their Ys.
- Worked with WizeHive (grant portal provider) to make some tweaks to the report/reimbursement forms that YMCAs complete monthly; tested and finalized these updates.

1) Provide an update on the objectives, as outlined in your Scope of Work, of the grant project. Have you accomplished any of your objectives?

- Accomplished objective:** At least 217 YMCA staff have been trained in YMHFA- they are now certified to recognize the signs of teen mental health challenges and know how to respond appropriately. (Goal was 120 by June 30, 2024. Staff continue to sign up for training.)
- Accomplished objective:** 19 Y staff are now certified as YMHFA instructors (Goal was 9 staff trained by June 30, 2024, in order to ensure other staff are equipped in training Y staff ongoing.)
- Objective update:** 63 teens have been referred to mental health providers as a result of being trained in YMHFA and having the capacity and knowledge to recognize potential challenges and know how to support and refer teens and their families to expert help. (Goal was that Teens and their parents or guardians in YMCA programs will be referred to a mental health provider in their community within three business days of identification of a potential mental health issue.)
- Objective update:** Several YMCAs have begun planning to offer Teen Mental Health First Aid. (Goal is: 5 teens between the ages of 15-18 will be trained in Teen Mental Health First Aid by December 31, 2024.)
- Objective update:** Goal is that Teens and youth in YMCA programs will increase their scores in Social Emotional Learning capacities as measured by Hello Insight pre- and post-assessments by June 30, 2025. YMCAs are beginning the process of utilizing Hello Insight tools to measure SEL capacity; this is a long-term process.
- Objective update:** Goal is that Youth Development staff will increase their scores on staff assessments in Social Emotional Learning indicators as measured by Hello Insight pre- and post-assessments by June 30, 2025. Again, this is a long-term process and has just begun now.

2) Provide an update on your expected results, as outlined in your Scope of Work, of the Grant Project(s). Have you accomplished any of your expected results?

After officially launching this work in March, most YMCAs ramped up their work in this quarter; some hired staff focused specifically on teen programming, while others planned and/or launched programs for teens that incorporate mental health resources and support.

Expected Result #1: YMCA Youth Development staff will have grown their capacity to support youth ages 11-18 in identifying potential mental health issues, will have greater capacity to support resilience in youth through training and utilization of character development and SEL techniques.

This has been achieved through staff being certified in YMHFA and Ys providing SEL training for staff. This will be an ongoing process for Ys, particularly as they continue to onboard new staff serving youth.

Expected Result #2: Youth Development staff will also grow in their own social emotional development, and exhibit greater capacity and feelings of competency in SEL supports for the youth they serve
capacity and feelings of competency in SEL supports for the youth they serve.

We have not assessed staff yet.

Expected Result #3: YMCAs will have trained staff in Youth Mental Health First Aid training, and the Ys will have sustained capacity for training for additional staff beyond the grant period as youth development leadership staff in diverse geographic regions across the state will be certified as Youth Mental Health First Aid trainer. Ys will have the capacity to continue to train staff as staff turnover and promotions result in new staff working in youth programs.

19 staff to date have been certified as YMHFA instructors, ensuring a deeper bench of resources to provide continued YMHFA training in our state beyond the grant period.

Expected Result #4: YMCA Associations will utilize a social media campaign developed for the Charlotte YMCA to offer support to teens in their communities, directing teens to suicide prevention and acute intervention opportunities through 988lifeline.org.

In addition to Ys receiving printed and digital assets in Q1 2024 for this purpose, at least 15 Ys to date have included specific content on their website about teen mental health and resources available, including the 988 lifeline; we are leveraging free Google Ad Grants campaign dollars to elevate awareness of the Teen Mental Health Resources Hub.

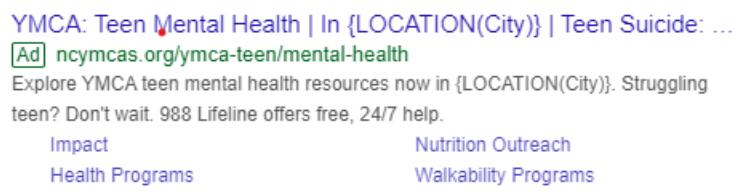
3) Provide an update on your performance measures, as outlined in your Scope of Work, for the Grant Project(s).

Measures are cumulative to date for the grant, not just this quarter.

Output Measures

- TA provided to YMCAs: yes, via monthly Zoom meetings, one-on-one calls and Zoom meetings and 2 Office hours sessions
- 19 staff trained as YMHFA trainers
- 217 staff trained in YMFHA
- No data yet on staff feelings of competency in SEL
- 397 social media posts to date, 8,803 website visits to Teen Mental Health Resources Hub on Alliance website or local Y's teen mental health pages (Oct 1, 2023-June 30, 2024; 6,071 of these visits were between April 1-June 30, 2024); \$877.51 "spent" on Google Ads (via Google Ad Grants for nonprofits) resulting in 517 clicks on the ads related to teen mental health , and the ads were displayed 5,103 times to people searching on mental health topics between late April and June 30.)

Example of Google Ad via Google Ad Grants:



- 0 teens trained in tMHFA

Outcome Measures

- 448 of programs offered by Ys that incorporate mental health
- 4,588 youth served in such programs
- 63 referrals to mental health providers
- Improvement in Hello Insight scores for youth indicating SEL capacity growth—too soon to tell for 11-18 year olds; this is not measured on a monthly or quarterly basis but is program related and for most of the Ys, they are not yet measuring SEL for the 11 to 18-year-olds they serve. However, in measuring youth aged 5-10, 88% of youth in Y afterschool programs grew in at least one SEL capacity during the 2023-2024 school year, based on assessments from Jan 2024-May 2024. Nearly half of those children grew in at least three core SEL capacities. Research shows that SEL is a protective factor for mental health and well-being, so in addition to our focus on teens, the Y continues to implement SEL strategies for children it serves.
- Improvement in staff confidence/capacity around SEL practices- again, we have not assessed this yet for staff.

4) Provide a summary of expenditures during the reporting period (quarter).

<u>Expenditure Category</u>	<u>Amount of expenditure</u> <u>SFY 2023-2024</u>	<u>Amount of expenditure</u> <u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$3448.40	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$0	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$8.44	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$0	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	\$11,726.00	\$0
Other Expenses (Specify): reimbursements to beneficiaries	\$176,772.63	\$0
Total Expenses:	\$191,955.47	\$0

5) Provide a summary of year-to-date expenditures through the end of the current reporting period. The total expenditures on this table should equal the cumulative expenditures from all completed quarterly reports to date.

<u>Expenditure Category</u>	<u>Amount of Expenditure</u>	<u>Amount of Expenditure</u>
	<u>SFY 2023-2024</u>	<u>SFY 2024-2025</u>
Amount of Appropriation	\$1,875,000.00	\$1,875,000.00
Personnel/Contracted Services Expenses (e.g., program-related staffing)	\$6578.79	\$0
Supplies and Materials Expenses (e.g., office supplies):	\$15,510.00	\$0
Non-Fixed Operating Expenses (e.g., travel, utilities):	\$868.13	\$0
Fixed Operating Expenses (e.g., office rent, dues and subscriptions):	\$0	\$0
Property and Equipment Expenses (e.g., buildings and improvements):	\$0	\$0
Services/Contracts Expenses (e.g., purchase of services, contracts with service providers):	77,847.75	\$0
Other Expenses (Specify): reimbursements to beneficiaries	229,417.41	\$0
Total Expenses:	\$330,222.08	\$0

If there are any questions, please contact the Contract Administrator.