

## Meet the Grantmakers: Healthcare Georgia Foundation

### Speakers:

- Racquel Lee-Sin, MPA, Grants Manager, Healthcare Georgia Foundation
- Lisa Medellin, MSW, Senior Program Officer, Healthcare Georgia Foundation
- Michael J. Sweeney, III, Chief Financial Officer, Healthcare Georgia Foundation



Follow us [@HealthcareGA](#), conference hashtag [#Connections2014](#) for conference info, real-time content, and prizes!



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# AGENDA

- Healthcare Georgia Foundation Overview
- The Foundation's Application Process
- Grant Application Review Criteria
- Financial Review
- Post Grant Award Activities
- Evaluation Resource Center

# Healthcare Georgia Foundation

## **Overview**

Lisa Medellin, Senior Program Officer

# About the Foundation

- Healthcare Georgia Foundation is a statewide, private independent foundation located in Atlanta, Georgia.
- Established in 1999, **the Foundation's mission is to advance the health of all Georgians and to expand access to affordable, quality healthcare for underserved individuals and communities.**
- 9 member Board of Directors and 9 staff members
- Foundation Supports 10 Regions across the state of Georgia.

# Healthcare Georgia Foundation

## Vision:

Achieve Health Equity Among Georgians

## Goals:

- Protect and promote the health of individuals, families & communities
- Improve the availability, quality, appropriateness & financing of healthcare services
- Integrate & coordinate efforts to improve health and healthcare services

# Foundation Priority Areas

1. Addressing Health Disparities
2. Expanding Access to Affordable Quality Health Care Services
3. Promoting Health and Preventing Disease
4. Strengthening and Sustaining Health Nonprofit Organizations, Programs, and Workforce



# Funding Regions

Region 1: NW, Dalton

Region 2: NE, Gainesville

Region 3: Metro Atlanta

Region 4: LaGrange

Region 5: S. Central, N. Central

Region 6: Augusta

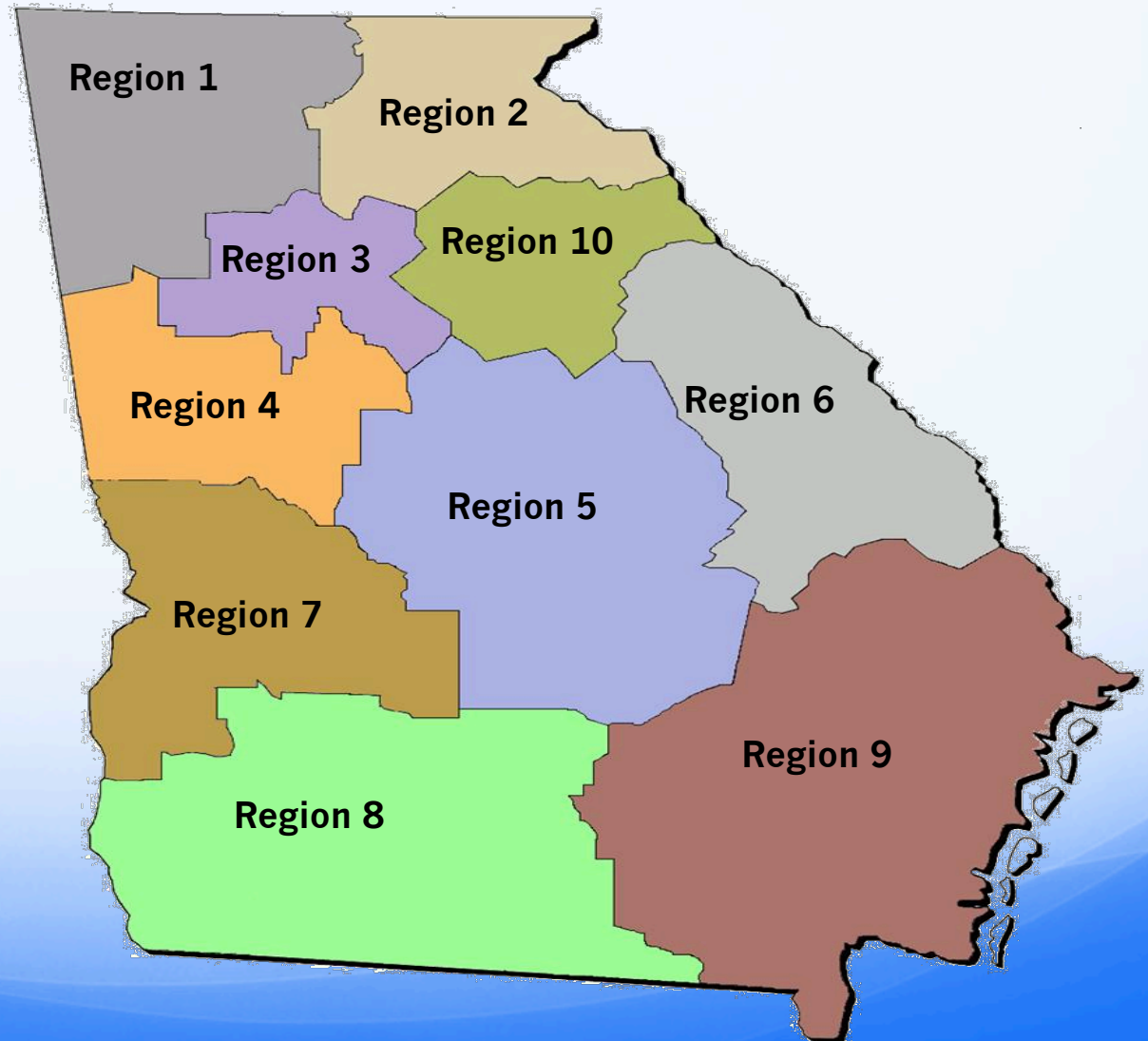
Region 7: West Central

Region 8: SW, Valdosta

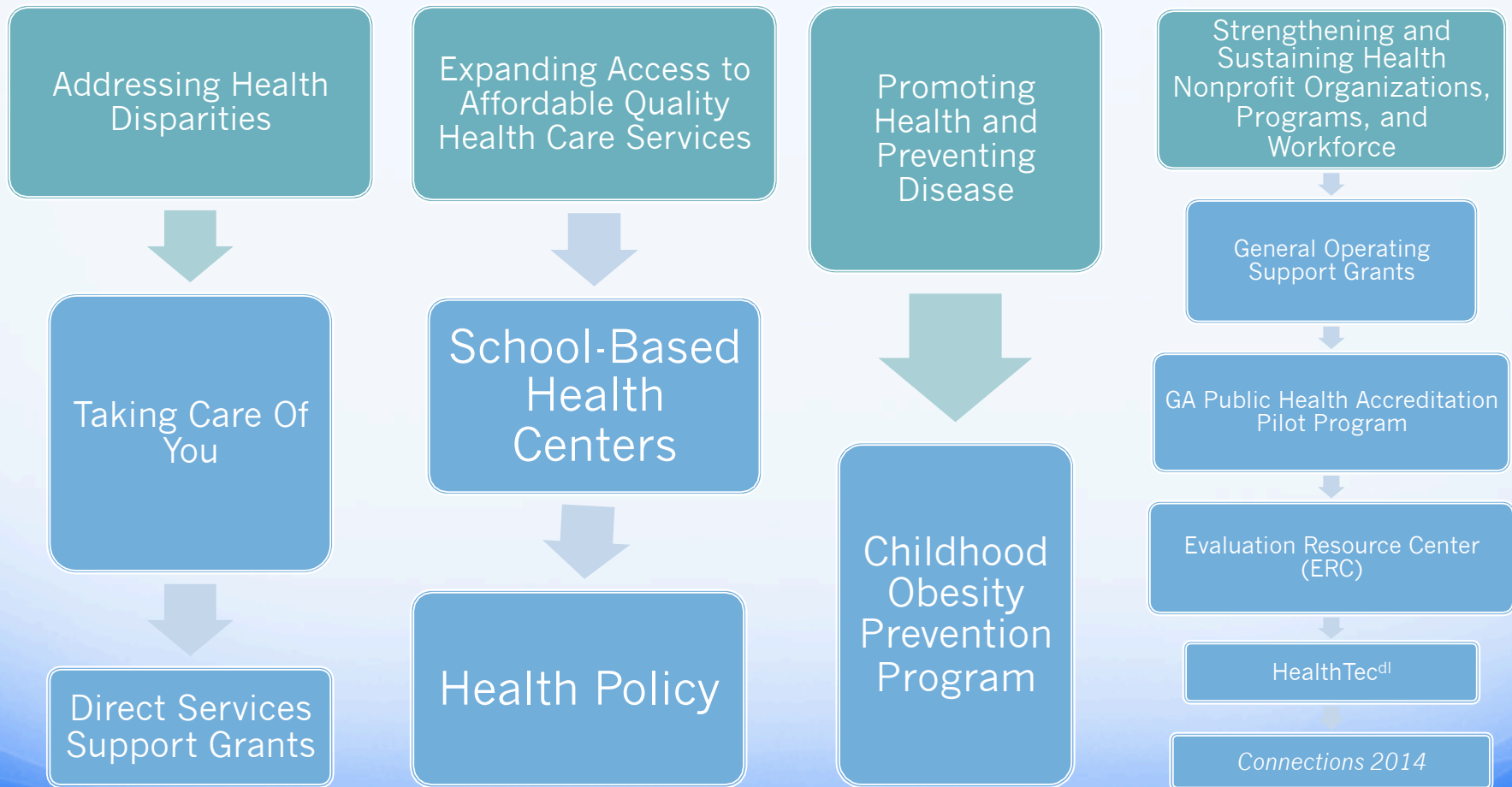
Region 9: SE, Savannah,  
Coastal

Region 10: Athens

Statewide



# Programmatic Framework



# Grant Programs and Direct Charitable Activities

- Request for Proposals (RFP) strategic grantmaking
- General Operating Support Grants
  - Released in January 2014 and currently under review.
- Direct Services Support Grants
  - Will be available in this Fall.
- Direct Charitable Activities
  - HealthTec<sup>dl</sup>
  - *Connections* Conference
  - Evaluation Resource Center
  - Capacity Building Project

# Healthcare Georgia Foundation

## **Application Process**

Racquel Lee-Sin, Grants Manager

# Before you submit an application

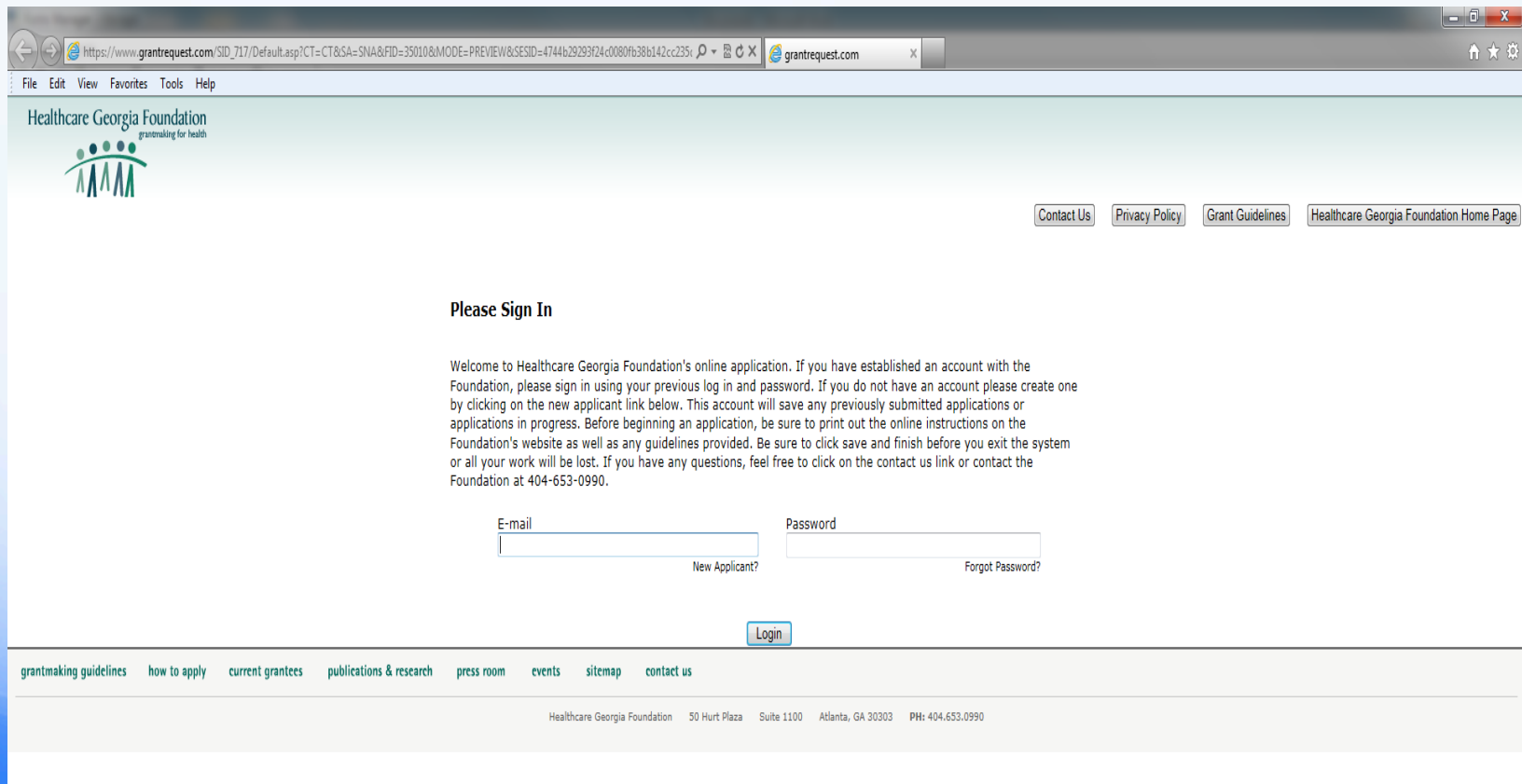
- Do your research
  - Thoroughly review the website
  - Know the mission, goals, and funding priorities of the organization
  - Who is the target population?
  - Funding Cycles
  - Staff
- Pre- Application Webinars

# Online Submission

## All Applications are submitted online

- How to access the online system

Step 1: Account Login – New or Returning User



The screenshot shows a web browser window with the URL [https://www.grantrequest.com/SID\\_717/Default.asp?CT=CT&SA=SNA&FID=35010&MODE=PREVIEW&SEID=4744b29293f24:c0080fb38b142cc235r](https://www.grantrequest.com/SID_717/Default.asp?CT=CT&SA=SNA&FID=35010&MODE=PREVIEW&SEID=4744b29293f24:c0080fb38b142cc235r). The page features the Healthcare Georgia Foundation logo (grantmaking for health) and navigation links for Contact Us, Privacy Policy, Grant Guidelines, and Healthcare Georgia Foundation Home Page. The main content area is titled "Please Sign In" and contains a welcome message: "Welcome to Healthcare Georgia Foundation's online application. If you have established an account with the Foundation, please sign in using your previous log in and password. If you do not have an account please create one by clicking on the new applicant link below. This account will save any previously submitted applications or applications in progress. Before beginning an application, be sure to print out the online instructions on the Foundation's website as well as any guidelines provided. Be sure to click save and finish before you exit the system or all your work will be lost. If you have any questions, feel free to click on the contact us link or contact the Foundation at 404-653-0990." Below the text are two input fields: "E-mail" with a "New Applicant?" link below it, and "Password" with a "Forgot Password?" link below it. A "Login" button is positioned below the password field. The footer contains a navigation menu with links for grantmaking guidelines, how to apply, current grantees, publications & research, press room, events, sitemap, and contact us, along with the address: Healthcare Georgia Foundation, 50 Hurt Plaza, Suite 1100, Atlanta, GA 30303, PH: 404.653.0990.

# Online Submission Application Checklist

- Organization's Tax ID number and tax letter
- Organization background, staff and volunteer information
- Organization contact and primary program contact information
- Information about your request, amount requested, geographic location of organization, geographic location serving, gender served, age group, ethnicity, need for funding and objectives
- Organization's annual budget
- List of funders
- List of Board of Directors & Staff
- Operating budget
- Most recent audit
- Support letters

# Online Submission

## Important things to know

- What is the deadline of the application?
- When do I need to start my application and how long will it take to complete?
- Can I submit after the deadline?
- What do I do if I have questions?
- All Grant applications are competitive, be sure to print the instructions and review prior to starting the application.
- The online system does NOT spell check – it is suggested to answer your questions in a Word document and copy and paste it into the application.

**SAVE! SAVE! SAVE!**

# Guidelines

- Read and understand the criteria and guidelines
  - Is your organization and/or program a good fit/match?
  - Are there any geographic limitations?
- Outline your funding needs
- Understand the process!
  - Know the application submission requirements (letter of intent, application form, or full proposal)
  - Contact staff if unclear about guidelines

# Healthcare Georgia Foundation

## **Application Review Criteria**

Lisa Medellin, Senior Program Officer

# What Do Funders Look For?

- Program is a fit with the funder's mission and priority areas of interest
  - Project should also fit the funder's general guidelines (e.g. funding restrictions)
- Application guidelines are followed
  - All questions should be fully addressed
  - Application should include required information (e.g. budget, cover sheet, attachments)

# What Do Funders Look For?

- Need and target population are clearly defined
  - Include demographic information about the target population
- Detailed intervention strategy
  - Intervention should address the need outlined
- Program Description
  - Concise and Clearly Defined: Not the same as Mission Statement
  - Clearly defined activities to accomplish goals

# What Do Funders Look For?

- Scope of Work/Case Statement
  - Clearly describe Who, What, When and Where
- Measurable outcomes and objectives
  - Be SMART (Objectives should be *Specific, Measurable, Achievable, Realistic and Time-Specific*)
- Organizational Capacity
  - Does the organization have prior experience in the proposed project?
  - Does the organization have the budget and staff to fully implement the project?

# What Do Funders Look For?

- Partnerships and/or Community Support
  - Letters of Support vs. Memorandum of Understanding
- Evaluation Plan
  - How do you define success?
  - What evaluation tools will you use to measure the program's impact?
- Budget is consistent with scope of work
  - Include budget narrative
- Sustainability
  - Plan to sustain the program after grant funds end

# Healthcare Georgia Foundation

## **Financial Review**

Mike Sweeney, Chief Financial Officer

# The Financial Review

- Why Financials are important
- Financial Statements
- Internal Controls
- Audit
- IRS Form 990
- Risk Assessment

# Healthcare Georgia Foundation

## **Post-Grant Award**

Racquel Lee-Sin, Grants Manager

# After a Grant is Awarded

- Grant Agreements (legal binding document)
  - Review the grant agreement thoroughly before signing
  - Check for objectives, reporting requirements and deadlines, and payment dates
  - Project does not officially begin until both parties have signed the grant agreement
  - Remember, this is a grant, not a gift, donation, or contract!
- Grantee Orientation

# Reporting

- Progress/Final Reports
  - Report on project activities and progress towards objectives
  - Update budget expenditures and note any changes in budget
  - Request for Modification and Budget Amendment Forms can be found on the website.
- Communicating with Foundation staff
  - Know your assigned program officer
  - Report any changes in project scope of work and/or budget

Be aware of the funder's requirements for press releases and restrictions on lobbying.



Georgia

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Evaluation Resource Center

*Because results matter.*

# **Evaluation**

## **Maddy Frey, Director of Evaluation**

# The ERC: Because Results Matter

The Georgia Evaluation Resource Center offers evaluation tools and services tailored to help nonprofit health organizations achieve better outcomes.

# Our commitment to better outcomes



# ERC Benefits

## For Grantees

- Increased evaluation and organizational capacity
- Communicating achievements
- More competitive for grant funding

## For the Foundation

- Informed funding decisions
- Improved performance
- Increased impact

# There are some very real barriers to evaluation:

- Evaluation will make me look bad
- I don't have the time
- I don't have the resources
- I don't know where to start

# ERC Services

Coaching &  
technical assistance

Learning Community

Website & Toolkit

Direct Evaluation Support

Referral Service



# Georgia Evaluation Resource Center

*Because results matter.*

## ABOUT THE ERC

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## SERVICES

COACHING & TECHNICAL ASSIST

TRAINING & PEER LEARNING

TOOLKIT

DIRECT EVALUATION SUPPORT

## RESOURCES

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Want to Learn More?

CONTACT US



Healthcare Georgia Foundation's **Evaluation Resource Center (ERC)** offers evaluation tools and services tailored to help nonprofit health organizations achieve better outcomes.

The ERC is directed and funded by Healthcare Georgia Foundation.

## WHY EVALUATE?

Healthcare Georgia Foundation believes strongly in the benefits of evaluation: that all organizations should understand their work and why it matters. Evaluation gives health nonprofits the information they need to improve their organizations and programs, ultimately benefitting the individuals, families and communities they serve.

[Learn more >](#)

## READY TO GET STARTED?



USE THE TOOLKIT

## THE EVALUATION PROCESS

Getting started is easy. Our Toolkit will help your organization navigate the evaluation process in a clear, chronological way. [Click here to begin.](#)



MEASURE



IMPROVE



COMMUNICATE

# Contact Information

Lisa Medellin, Senior Program Officer  
[Imedellin@healthcaregeorgia.org](mailto:Imedellin@healthcaregeorgia.org)

Racquel Lee-Sin, Grants Manager  
[rlee-sin@healthcaregeorgia.org](mailto:rlee-sin@healthcaregeorgia.org)

Mike Sweeney, Chief Financial Officer  
[msweeney@healthcaregeorgia.org](mailto:msweeney@healthcaregeorgia.org)

Maddy Frey, Director of Evaluation  
[mfrey@healthcaregeorgia.org](mailto:mfrey@healthcaregeorgia.org)

*All staff can also be reached by phone at (404) 653-0990*

# Questions