

**Health Systems Access to Care Fund**

**Year 1 Status Report & Year 2 Application**

**Due by 5:00 pm November 1, 2019**

Welcome to the Year Two Health Systems Access to Care Fund application. The application includes both a status report on Year One, and your application for Year Two. You will also need to complete the budget report using a separate Excel template which is provided.

In this application we provide templates for you to complete that are intended to enable a summary level view of your progress in Year One, and of what you intend to accomplish in Year Two. Please complete the templates per the instructions offered. We encourage you to be concise and direct. These completed templates will meet all requirements for reporting for Year One and for requesting funds for Year Two. If you wish to provide additional narrative that the template doesn’t appear to accommodate, you are welcome to include additional documents.

Submit completed Word document and Excel budget report via e-mail to Michael Achterman at Oregon Community Foundation by **5:00 pm on November 1, 2019**: [MAchterman@oregoncf.org](mailto:MAchterman@oregoncf.org)

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| --- | --- |
| **Organization Name:** |  |

**Year One Status Report Date Range: January – September 2019**

Please use the template below to summarize your progress to-date on each of your Year One projects. For each project, use the template to (a) indicate which Project Area is being addressed (b) provide a brief description of project objective(s) and scope from your Year One proposal (c) list each of the major activities you had planned for Year One (d) indicate the expected finish date for each activity (e) indicate the color coded status of each of the activities **(Red:***blocked***; Yellow:** *slowed, but plan in place;* **Green:** *on track*), (f) provide a brief explanation of the status. Then describe the expected Result, when you expected to achieve it, and its status.

If you are reporting on the status of more than two projects, please copy and use this same template to report on each.

**Accomplishments in Year One**

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| ***Summary of Project One Accomplishments*** | | | |
| **Project Area:**  Value proposition, market position and key partnerships  Business model and funding strategy  Engaged and aligned leadership  Fiscal tracking, reporting, analysis and management | **Planned Finish Date** | **Status:**  **Red/Yellow/**  **Green\*** | **Tracking to Schedule?**  **Explanation** |
| **Project Description:** | | | |
| *Planned Activity:* |  |  |  |
| *Planned Activity:* |  |  |  |
| *Planned Activity:* |  |  |  |
| **Result***:* |  |  |  |

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| ***Summary of Project Two Accomplishments*** | | | |
| **Project Area:**  Value proposition, market position and key partnerships  Business model and funding strategy  Engaged and aligned leadership  Fiscal tracking, reporting, analysis and management | **Planned Finish Date** | **Status:**  **Red/Yellow/**  **Green\*** | **Tracking to Schedule?**  **Explanation** |
| **Project Description:** | | | |
| *Planned Activity:* |  |  |  |
| *Planned Activity:* |  |  |  |
| *Planned Activity:* |  |  |  |
| **Result***:* |  |  |  |

**Key Barriers**

Please use the table below to summarize what barriers, if any, limited or are limiting what you set out to accomplish in Year One?

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| --- | --- | --- | --- |
| **Priority \***  **(H, M or L)** | **Summary Description**  **of Challenge and Impact** | **Recommended Solution** | **Steps We are Taking Now** |
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***\*Priority:***

* ***High:*** *Needs to be resolved in order to move forward in year 2*
* ***Medium:*** *Will create constraints for moving forward*
* ***Low:****Will create constraints for moving forward, but solutions are too challenging to address and/ or impacts are manageable*

**Year Two Plan**

**Please use the template below to summarize your project objectives and planned activities for Year Two.**

Project Area:

For each Year Two project please indicate the Project Area being addressed

Project Objective:

For each Year Two project that is a continuation of a Year One project, please (a) summarize the Year One plan objective, (b) describe any updates to the objective(s) (c) explain the reason for the update (d) summarize the Year Two objective(s). For new projects, please just summarize the Year Two objective(s).

Planned Activities and Results:

For each planned activity that is a continuation from Year One, please (a) describe the activity (b) describe any challenges and their impact in Year One (c) any resulting change in scope (d) the expected Year Two completion date for the activity. For new planned activities, please (a) describe the activity (b) describe the scope and (c) indicate the expected Year Two completion date of the activity and describe the expected Result and when you expect to achieve it.

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| **Project One** | |
| **Project Area**  Value proposition, market position and key partnerships  Business model and funding strategy  Engaged and aligned leadership  Fiscal tracking, reporting, analysis and management | |
| **Project Description (Brief):** | |
| **Year One Objective:** | |
| **Updates Needed:** | **Explanation:** |
| **Year Two Objective:** | |

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| --- | --- | --- | --- |
| **Summary Description of Project One**  **Planned Activities** | **Challenge and Impact in Year One** | **New Scope** | **New Due Date** |
| Planned Activities Continued from Year One: | | | |
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| New Planned Activities | | | |
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| **Project Two** | |
| **Project Area**  Value proposition, market position and key partnerships  Business model and funding strategy  Engaged and aligned leadership  Fiscal tracking, reporting, analysis and management | |
| **Project Description (Brief):** | |
| **Year One Objective:** | |
| **Updates Needed:** | **Explanation:** |
| **Year Two Objective:** | |

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| **Summary Description of Project Two**  **Planned Activities** | **Challenge and Impact** | **New Scope** | **New Due Date** |
| **Planned Activities Continued from Year One** | | | |
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|  |  |  |  |
| New Planned Activities | | | |
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**Budget report: Summary of Year One and Two Use of Grant Funds:**

Please use the separate Excel template to show your Year One budget, your actual year-to-date revenue and expenses, and your expected 12-month results. Please show your budget for Year Two, including any prior year carry-over of the Health Systems Access to Care grant funds. Submit both documents to Michael Achterman ([MAchterman@oregoncf.org](mailto:MAchterman@oregoncf.org)) at Oregon Community Foundation by **5:00 pm, November 1, 2019.**