

# Community Action Fund Funding Reporting Tool (CRT) Recipient User Guide

*The webinar will begin at 1pm EST*



**To hear the  
Webinar you must  
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1-877-413-4790**

**Participant pass code: 210 409 8#**

*Your teleconference line will be muted.*



Public Health  
Agency of Canada

Agence de la santé  
publique du Canada

Canada

# Community Action Fund Funding Reporting Tool (CRT) Recipient User Guide

March - April 2018

PROTECTING AND EMPOWERING CANADIANS  
TO IMPROVE THEIR HEALTH



## **You will have received a personalized copy of the CRT in excel**

- You should have received a copy of the CRT in excel by now – if not please contact your program consultant
- Each CRT has been set up with information specific to each project
- Items such as your SMART objectives and key year one outcomes have been imported to the tool
- These items will populate dropdown menus throughout the survey
- You should also have a copy of the CRT user guide
- It would be helpful to open the CRT and follow along with today's presentation

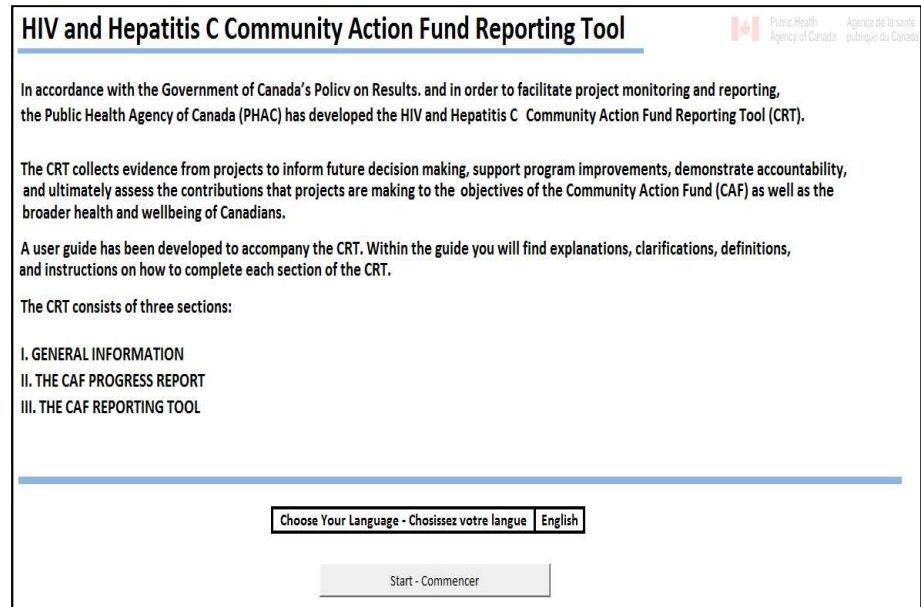
# Overview

- Context
- Excel basics
- Introduction to the CRT
- CRT Section 1: General Information
- CRT Section 2: The Progress Report
- CRT Section 3: The Reporting Tool
- Questions

# CONTEXT

## CAF REPORTING REQUIREMENTS:

- Annual Progress Report (annual or semi-annual)
- Annual Performance Measurement & Evaluation Requirements Report (*Contribution Agreement: Section 8.1; Québec: Section 16*)



**HIV and Hepatitis C Community Action Fund Reporting Tool**

In accordance with the Government of Canada's Policy on Results, and in order to facilitate project monitoring and reporting, the Public Health Agency of Canada (PHAC) has developed the HIV and Hepatitis C Community Action Fund Reporting Tool (CRT).

The CRT collects evidence from projects to inform future decision making, support program improvements, demonstrate accountability, and ultimately assess the contributions that projects are making to the objectives of the Community Action Fund (CAF) as well as the broader health and wellbeing of Canadians.

A user guide has been developed to accompany the CRT. Within the guide you will find explanations, clarifications, definitions, and instructions on how to complete each section of the CRT.

The CRT consists of three sections:

- I. GENERAL INFORMATION
- II. THE CAF PROGRESS REPORT
- III. THE CAF REPORTING TOOL

Choose Your Language - Choisissez votre langue | English

Start - Commencer

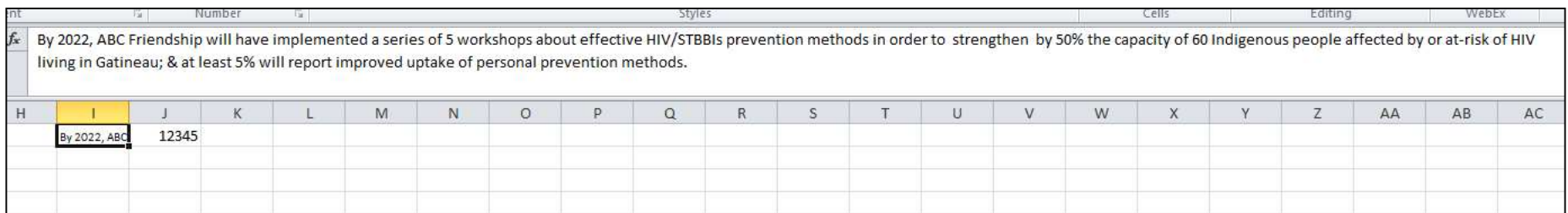
**Both annual reports have been integrated into one Excel® document:  
the CRT**

# Excel® Basics

- Navigation
  - Arrow keys (↑, ↓, ←, →): move the cursor one cell in the direction of the arrow
  - Enter: Moves the cursor down one row
  - Shift+Enter: Moves the cell cursor up one row
  - Esc: Cancels any changes made to a cell
- Selecting and Editing Cells
  - You can select a cell by clicking on it. The active cell will be highlighted by a thick black band
  - When a cell is selected anything you type will overwrite anything already in the cell. To edit data within a cell (without overwriting it) double click on the cell. This will bring up a cursor similar to what you would see in a word processing document

## Excel Basics (Continued)

- Sometimes a cell may contain data that is too long to be read in the cell itself.
- The contents of whatever cell you have selected will appear in the formula bar at the top of the page.



The screenshot shows an Excel spreadsheet with a formula bar at the top. The formula bar contains the text: "By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; & at least 5% will report improved uptake of personal prevention methods." Below the formula bar, the spreadsheet grid is visible. Cell I1 is selected and contains the text "By 2022, ABC". Cell J1 contains the number "12345". The columns are labeled H through AC, and the rows are labeled 1 through 3.

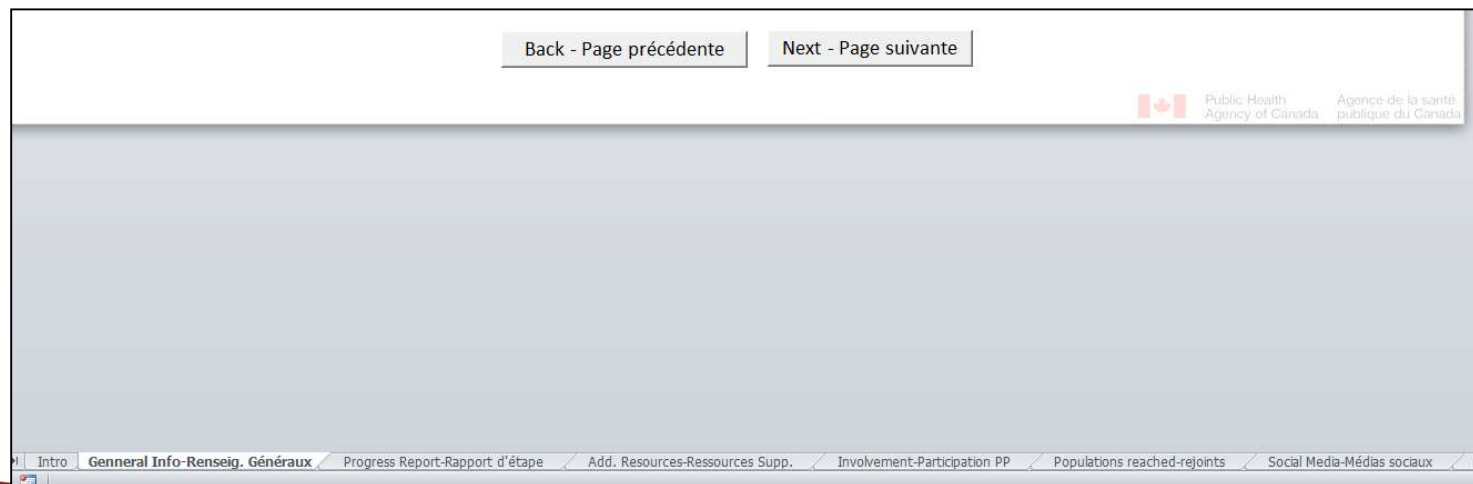
	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1		By 2022, ABC	12345																			
2																						
3																						

# Introduction to the CRT

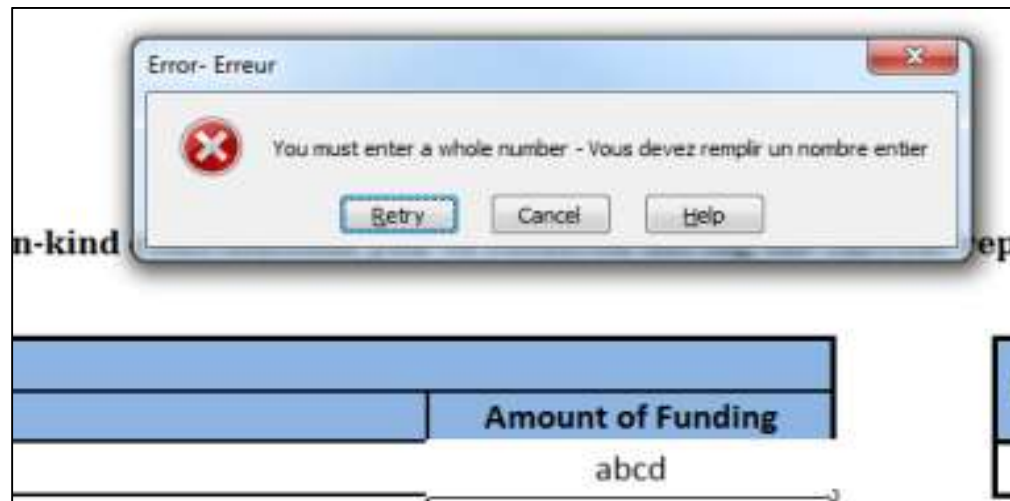


# Intro

- Enable Macros
- Choose language
- Forward and back buttons



- The CRT has been set up so those cells which do not require you to enter data are read only. Attempts to edit these cells will return an error message.
- Additionally some cells force you to enter certain types of data such as whole numbers. Entering invalid data will return an error. If you see one of these errors simply click cancel and enter your data again.

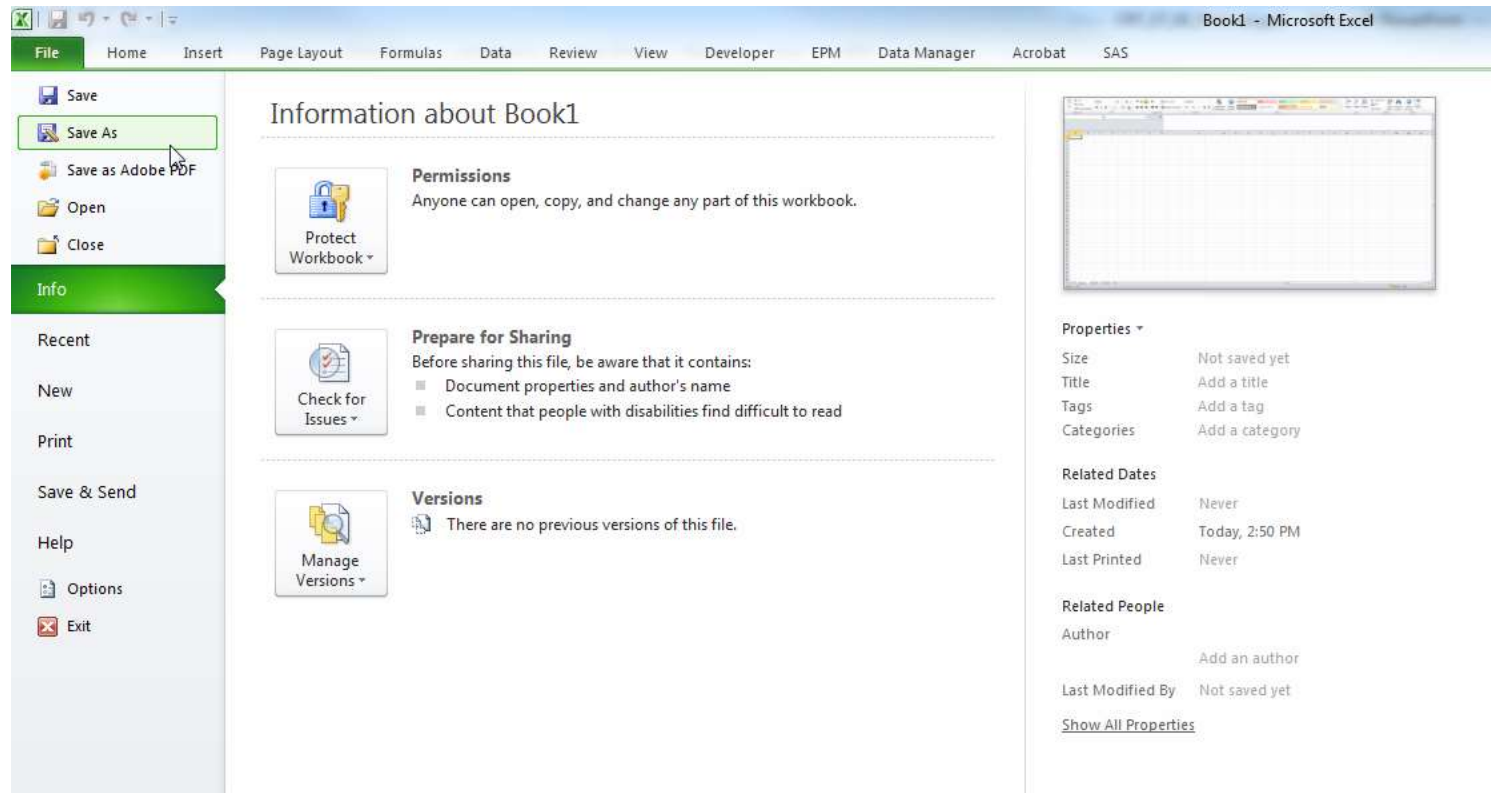


- A number of cells are pre-populated with dropdown menus. When you select these cells you will see a small arrow. Clicking the arrow will open the dropdown menu.

13		
14	<b>Additional Funding</b>	
15	<b>Source of Funding</b>	<b>Amount of Funding</b>
16		
	Fundraising - Collecte de fonds	
	Private Sector - Secteur privé	
	Levels of Government other than Federal - Gouvernements autres que fédéral	
	Federal Government other than the Community Action Fund - Gouvernement fédéral autre que le Fonds d'initiatives communautaires	

# Before You Begin Completing your CRT

- Save your work locally
- Use “Save As” not “Save” the first time you save or you may lose your data
- Save Early, Save Often



## **SECTION 1: General Information**

# General Info

- Most of this section will be pre imported from our records
- Please provide Contact Information
- One contact and one alternate contact even for alliances

**SECTION I: GENERAL INFORMATION**

**1. Project Identification**

<b>Name of Project</b>	Example HIV Network
<b>Project ID Number</b>	2558
<b>Is this project an alliance?</b>	No
<b>Reporting Period</b>	2017-2018

**2. Name(s) of Organization(s)**

<b>Name of Organization(s)</b>	<b>GCIMS Number(s)</b>
Sample Org	2017HQ-123456

**3. PHAC Contact**

<b>Name of PHAC Project Consultant</b>	Joe Anybody
<b>Email of PHAC Project Consultant</b>	j-anybody@canada.ca

**4. Project Contact**

Please provide the following information for your project.

<b>Name of person responsible for project reporting</b>	
<b>Title of person responsible for project reporting</b>	
<b>Phone number of person responsible for project reporting</b>	
<b>Email of person responsible for project reporting</b>	

**5. Alternate Project Contact**

Please provide the following information for an alternate project contact.

<b>Name of alternate contact for project reporting</b>	
<b>Title/ Position of alternate contact for project reporting</b>	
<b>Phone number of alternate contact for project reporting</b>	
<b>Email of alternate contact for project reporting</b>	

## **SECTION 2: Progress Report**

# Progress Report

- Tracks objectives and activities over the course of the reporting period
- Organized by SMART Objective

## SECTION II: COMMUNITY ACTION FUND PROGRESS REPORT

*Note: the progress report is organized by SMART Objectives.*

### 1. SMART Objective 1

Your first SMART Objective will be imported to this spot

#### 1.1. Have any planned project outputs for SMART Objective 1 changed during this reporting period?

Yes/No	
Yes - Oui	<input type="text"/>
No - Non	<input type="text"/>

If YES, please explain.



## Progress Report (continued)

Output	Was the output completed within the specified timeline?	If you are not on track to meet this timeline, please explain why.	If you are not on track to meet this timeline, please indicate a revised timeline for completing this output	Did you conduct any evaluations for this output?

## Progress Report (continued)

Output	Was the output completed within the specified timeline?	If you are not on track to meet this timeline, please explain why.	If you are not on track to meet this timeline, please indicate a revised timeline for completing this output	Did you conduct any evaluations for this output?
5 workshops				
10 e-learning sessions				

## Progress Report (continued)

Output	Was the output completed within the specified timeline?	If you are not on track to meet this timeline, please explain why.	If you are not on track to meet this timeline, please indicate a revised timeline for completing this output	Did you conduct any evaluations for this output?
5 workshops	Yes			
10 e-learning sessions	No			

## Progress Report (continued)

Output	Was the output completed within the specified timeline?	If you are not on track to meet this timeline, please explain why.	If you are not on track to meet this timeline, please indicate a revised timeline for completing this output	Did you conduct any evaluations for this output?
5 workshops	Yes			
10 e-learning sessions	No	Difficulty reaching audiences	Year 2	

## Progress Report (continued)

Output	Was the output completed within the specified timeline?	If you are not on track to meet this timeline, please explain why.	If you are not on track to meet this timeline, please indicate a revised timeline for completing this output	Did you conduct any evaluations for this output?
5 workshops	Yes			Yes
10 e-learning sessions	No	Difficulty reaching audiences	Year 2	No

## **SECTION 3: CAF Reporting Tool**

# 1. Additional Resources

- Additional Funding
  - Select a source of the funding from the dropdown menu
  - Indicate the total amount of funding leveraged from that source.
- In-Kind Contributions
  - Enter the total value of all in-kind contributions you received
- Use whole numbers

12 **1.1.1. If YES, please indicate the dollar value of any additional funding or in-kind contributions you've received during the current reporting period.**

13

14

Additional Funding	
Source of Funding	Amount of Funding
Private Sector - Secteur privé	\$5,000

15

16

17

Fundraising - Collecte de fonds  
 Private Sector - Secteur privé  
 Levels of Government other than Federal - Gouvernements autres que fédéral  
 Federal Government other than the Community Action Fund - Gouvernement fédéral autre que le Fonds d'initiatives communautaires

20

21 Back - Page précédente Next - Page suivante

22

In-Kind Contributions
\$10,000

## 2. Priority Population Involvement

- Question 2.1: Did individuals from priority populations contribute to your project?
- Question 2.2: How many individuals contributed?
  - Count each individual once
- Question 2.3: How did individuals contribute?
  - Each individual should be counted once per type of contribution but could contribute in multiple ways

11	<b>2.2 Please estimate how many individuals* from priority populations contributed to the development, management, and/or delivery of your project activities during the current reporting period.</b>	
12		
13	<b>Number of Individuals that Contributed to Project Activities</b>	
14	3	
15		
16	<b>2.3 Please explain how individuals belonging to priority populations contributed to the development, management, and/or delivery of your project activities during the current reporting period.</b>	
17		
18	Note: For this question, an individual should be counted once for each type of contribution they made to your project's activities	
19		
20	<b>Type of Contribution</b>	<b>Number of individuals that contributed to project activities</b>
21	Participated in decision-making processes (e.g. members of governing body; planning committee) - Participation à des processus décisionnels (p. ex. des membres de l'organe de direction, du	3
22	Volunteered in delivery of project activities - Bénévolat pour la réalisation des activités du projet	3
23		
24	Participated in decision-making processes (e.g. members of governing body; planning committee) - Participation à des processus décisionnels (p. ex. des membres de l'organe de direction, du comité de planification) Consulted on the development or implementation of the project (e.g. advisory committee) - Participation à une consultation sur l'élaboration ou la mise en œuvre du projet (p. ex. comité consultatif) Employed by project - Membre du personnel du projet Volunteered in delivery of project activities - Bénévolat pour la réalisation des activités du projet	



### 3.Reach

- Question 3.1.1 Total number of Unique Individuals reached
- Direct Contact
- Count each individual once
- Estimates are okay – we do not expect you to keep records of individuals

	Workshop 1	Workshop 2
	Bob	Bob
	Pierre	Pierre
	Jane	Stephen
	Sophie	Therese
	Bill	Joe
	Jen	Michelle
Total	6	6

<b>Total Number of Unique Individuals Reached</b>	10
---	----

### 3. Reach Continued

- Question 3.1.2
- National HIV Project
  - SMART Objective
    - By 2022, ABC Friendship will have implemented a series of **5 workshops** about effective HIV/STBBIs prevention methods in order to **strengthen by 50% the capacity** of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; & at least 5% will report **improved uptake of personal prevention** methods.
  - Outputs for Year 1
    - 5 workshops in Ottawa

SMART Objective	Output	First Three Digits of Postal Code Where Activity Took Place	No. of Individuals Reached

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<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>			

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<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>	<p>5 workshops in Ottawa</p>		

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<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>	<p>5 workshops in Ottawa</p>	<p>K1A</p>	

SMART Objective	Output	First Three Digits of Postal Code Where Activity Took Place	No. of Individuals Reached
<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>	<p>5 workshops in Ottawa</p>	<p>K1A</p>	<p>20</p>

### 3. Reach Continued

- Questions 3.2, 3.3, and 3.4
- Specific demographic information about priority populations you reached
- Can be estimated or obtained directly from individuals
- If you don't have the information click data not available and move on

3.2 Please report the number of individuals from priority populations that were reached during the current reporting period based on their age?

Data Not Available	<input type="checkbox"/>
--------------------	--------------------------

19 and under	Age Group 20-29	Age Group 30-39	Age Group 40-49	Age Group 50-59	Age Group 60+
15	20	10	0	0	0

3.3 Please report the number of individuals from priority populations that were reached during the current reporting period based on their gender identity/ gender expression?

Data Not Available	<input type="checkbox"/>
--------------------	--------------------------

No. of Females	No. of Males	No. of Trans Males	No. of Trans Females	No. of Other
20	20	2	2	1

3.4 Please identify the number of individuals from specific groups of Indigenous Peoples that were reached through your project activities during the current reporting period?

Data Not Available	<input type="checkbox"/>
--------------------	--------------------------

No. of First Nations Individuals	No. of Inuit Individuals	No. of Métis Individuals
10	2	4

### 3. Reach (Continued)

3.5.1 In the following table, please complete all rows that apply to your project. In all other rows enter NA.

	Number of Individuals
Number of individuals referred to STBBI testing services	15
Number of individuals referred to treatment	25



## 4. Social Media

- Check SMART objective(s) that were supported by social media
- You do not have to disaggregate your data by SMART objective

4.1.1. Which of your SMART Objectives did these activities support? Check all that apply

Your first SMART Objective will be imported to this spot	<input checked="" type="checkbox"/>
Your second SMART Objective will be imported to this spot	<input checked="" type="checkbox"/>
Your third SMART Objective will be imported to this spot	<input checked="" type="checkbox"/>
Your fourth SMART Objective will be imported to this spot	<input type="checkbox"/>

## 4. Social Media (Continued)

- Check each platform you used

**4.1.2 Please indicate which online platforms you used. Check all that apply.**

Website	<input checked="" type="checkbox"/>
Twitter	<input checked="" type="checkbox"/>
Facebook	<input type="checkbox"/>
Google+	<input type="checkbox"/>
YouTube	<input type="checkbox"/>
Chat Rooms (chat aps)	<input type="checkbox"/>
Tumblr	<input type="checkbox"/>
Instagram	<input type="checkbox"/>
Other Social Media	<input type="checkbox"/>
Closed Caption Advertising and/or Radio	<input type="checkbox"/>

## 4. Social Media (Continued)

- The platforms you check in question 4.1.2 will trigger further questions specific to each platform
- These ask you to enter platform specific metrics
- Full definitions of each metric can be found in the guide

4.2 Please provide the following details on the WEBSITE ACTIVITIES that were carried out during the current reporting period as part of your social media activities.

No. of Visits	No. of Page Views	No. of Unique Visitors	Bounce Rate

4.3 Please provide the following details on the TWITTER activities that were carried out during the current reporting period as part of your social media activities.

No. of Followers	No. of Re-tweets	No. of Likes

## 5. Knowledge Translation Exchange and Mobilization

<p><b>Title of Product and url if available online</b> <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>	<p><b>Type of Product</b></p>	<p><b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b> <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>

<b>Title of Product and url if available online</b> <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b>	<b>Type of Product</b>	<b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b> <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b>
HIV Quick Guide – <a href="http://www.hivquickguide.ca">www.hivquickguide.ca</a>		
HCV Quick Guide – <a href="http://www.hcvquickguide.ca">www.hcvquickguide.ca</a>		

<p><b>Title of Product and url if available online</b>  <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>	<p><b>Type of Product</b></p>	<p><b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b>  <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>
<p>HIV Quick Guide –  <a href="http://www.hivquickguide.ca">www.hivquickguide.ca</a></p>	<p>Pamphlets, fact sheets, booklets, posters, infographics, newsletters, periodicals</p>	
<p>HCV Quick Guide –  <a href="http://www.hcvquickguide.ca">www.hcvquickguide.ca</a></p>	<p>Pamphlets, fact sheets, booklets, posters, infographics, newsletters, periodicals</p>	

<p><b>Title of Product and url if available online</b>  <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>	<p><b>Type of Product</b></p>	<p><b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b>  <b>Please describe the populations and/or audiences for which this product was designed and/or adapted</b></p>
<p>HIV Quick Guide –  <a href="http://www.hivquickguide.ca">www.hivquickguide.ca</a></p>	<p>Pamphlets, fact sheets, booklets, posters, infographics, newsletters, periodicals</p>	<p>People living with HIV</p>
<p>HCV Quick Guide –  <a href="http://www.hcvquickguide.ca">www.hcvquickguide.ca</a></p>	<p>Pamphlets, fact sheets, booklets, posters, infographics, newsletters, periodicals</p>	<p>People living with Hepatitis C</p>

	Did you develop this product	If yes		If No		Purpose of Product	
		What was the date of release	What was the date of most recent update	Who was the original source of this product	Did you adapt this product	Information Activities	Education Activities
HIV Quick Guide	Yes	2010	2014			x	
HCV Quick Guide	No			PHAC	Yes	x	x



## 6. Evaluation

- National HIV Project
  - 5 workshops in Ottawa
  - Conducted a pre post test to measure knowledge

SMART Objective	Indicator	Result of Your Data

SMART Objective	Indicator	Result of Your Data
<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>		

SMART Objective	Indicator	Result of Your Data
<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>	<p>Percentage increased knowledge of HIV risk factors</p>	

SMART Objective	Indicator	Result of Your Data
<p>By 2022, ABC Friendship will have implemented a series of 5 workshops about effective HIV/STBBIs prevention methods in order to strengthen by 50% the capacity of 60 Indigenous people affected by or at-risk of HIV living in Gatineau; &amp; at least 5% will report improved uptake of personal prevention methods.</p>	<p>Percentage increased knowledge of HIV risk factors</p>	<p>45%</p>

## Key Dates

- March 31st, 2018: You are responsible to report on project activities up to the end of this day.
- April 30<sup>th</sup> 2018: Your completed CRT must be returned by this date.

# Questions

## Thank You

- For technical assistance while competing the CRT contact [kevindavid.armstrong@canada.ca](mailto:kevindavid.armstrong@canada.ca)