



Quarterly Report Protocol

- On a quarterly basis, Local Agency Coordinators will complete and submit the quarterly report form accompanied by applicable supporting documents to the Nutrition Coordinator.

Forms

- The Forms to be completed:
 - Quarterly Report Form (for current fiscal year)
 - Staff Training Log to include civil rights completion
 - Current Staff List Form (1st and 3rd quarter submit)
 - Peer Counseling Enhancement Plan and Quarter Report form
 - Time Studies if applicable

Purpose

- The purpose of the quarterly report is to measure LA performance and progress towards meeting their Nutrition Education Plan goals and objectives, creating corrective action plans in response to monitoring findings, and changes related to monitoring recommendations. The Peer Counseling report helps State understand program progress and how to best provide technical assistance. Fiscal and Operating detail report will help assure fiscal accountability.

Procedures

- Quarterly reports forms will be sent to LA Coordinators **January 1st, April 1st, July 1st, and October 1st** (or as close to that day as possible) by the Nutrition Coordinator.
- If applicable during the 2nd and 4th Quarter an additional reminder will be sent for the semi-annual certification form. This will not be obtained by the State office, but stored onsite by the LA for review during onsite monitoring.
- Please submit applicable support documents with the QR form. You may submit documents you feel are necessary. At minimum the following support documents must be submitted:
 - Q#4: Caseload should be reviewed. If caseload is < 97%, then the Corrective Action Plan Form should be completed and submitted with the QR (Only need to submit caseload corrective plan once per year, follow-up is required on the QR). Usually this is submitted in April (2nd quarter).
 - Q#7: Copy of No-Show rate tracking if applicable and attempts to contact prenatal applicants.
 - Q#8: Current staff list sent with the 1st and 3rd quarterly reports, and the required staff training logs to include civil rights each quarter.
 - Q#11: The Peer Counseling Enhancement Plan with updates for the quarter.
- Q#15: The LA must maintain a list of eligible institutions. This list is submitted with the 2nd quarter and the form also requires the date it was last updated.





- Quarterly reports will be due **January 31st, April 30th, July 31st, and October 31st** (or as close to that day as possible) by the end of the business day. The local agency Coordinator must electronically submit a copy of the completed forms and attachments to the Nutrition Coordinator at the State Office:

Teresa Kobza RDN, LD
(208) 334-5952
Teresa.kobza@dhw.idaho.gov

- The State office will use the comment form to complete sections. The comments form will be sent back to LA coordinators 30-31 days after the due dates.
 - **Green: Required documents submitted, Completion, and Positive Feedback. (state office completes)**
 - **Orange: Needs Improvement; questions; needs more information; and /or answers to questions (state office completes)**
- LA Coordinators will use the comment form to complete the blue section for any comments and / or needs improvement questions or concerns. The comments form will be sent back to the State Agency 60 days after the due date of the QR. *(The due date is specified in an email.)* The Nutrition Coordinator will alert the LA Coordinator in an email if comments are not expected.
 - **Blue: Proposed Solution; LA Action Plan; answers to questions; and /or questions.**
Please provide any solutions proposed or actions that will be taken in response to comments, answers to questions posed, or ask questions to the SO staff in the blue section.
- LA Coordinators may not have to respond to the sections of the comment form, only areas where information has been requested by the State Agency. If you feel you would like to make a response comment either way that is fine. While there may not be actual questions or comments requiring a response, the action plan could be as simple as a date one of the completed sections is anticipated to be done (i.e. the civil rights training or a pending corrective action plan).

