

## BHRR Deliverable Tip Sheet (Substantiating Documentation)

- This tip sheet is designed to provide guidance for submitting your quarterly deliverables, also known as substantiating documentation, for the BHRR grant.
- Deliverables are due on the 15<sup>th</sup> of the month following the ending of the previous quarter. For example, Quarter 3 ends March 31, 2024. Therefore, all documentation for Quarter 3 is due by April 15, 2024.
- To submit your deliverables, review your Implementation Plan (IP) for the quarter of focus. For example, these deliverables should be listed on the tab designated for Quarter 3. Deliverables attached to your quarterly report are items you indicated in the deliverable section for Quarter 3 in your IP. Discuss the selected deliverables with your Grantee Coach (GC) during your 1:1 coaching call to ensure alignment with your goals for that quarter.
- To submit your deliverables, log into the BHRR Administrative portal located here: [Home — Building California Portal \(buildingcalhhs.com\)](#)
- Complete all required information in the Quarterly Data Report (QDR). At the end of the report, attach all the documentation matching the deliverables section of your IP for the quarter of focus. Once you submit your QDR, the documentation will be available for review by your GC along with your quarterly report.
- Documents uploaded in draft form are acceptable as they reflect work done within the focus quarter.
- Submitting the QDR without substantiating documentation of progress toward strategies specified within the organization’s IP will result in invoice approval delays.
- Consider the substantiating documentation as evidence of the work you completed during the past quarter. To determine what to turn in, ask yourself the following questions: “How did we spend our funds, and what documents provide adequate proof of the work we did during the past quarter?” “Whose time was billed to BHRR, and what did they work on?”
- If you have questions about deliverables or their submission, please contact your GC.

## Suggestions for deliverables

Every grantee has a unique strategy for selecting and implementing BHRR. While there are standard deliverables (SWOT analysis, asset mapping, etc.) there are no prescriptive requirements for substantiating documentation. However, ideas for deliverables include:

- Stay interview questions
- Copies of additional needs assessments or results of completed needs assessments (outside the CBS survey)
- Copies of contracts setting up consultant services
- Copies of contracts reflecting setting up technology or learning management systems
- Copies of updated or newly created policies or procedures
- Revised job description templates
- Strategic planning documents or meeting documents related to strategic planning
- Training agendas or training curriculum
- Training catalog

- Job descriptions or job offers made to staff hired using BHRR funds, such as Diversity, Equity, and Inclusion (DEI) coordinators
- Meeting agendas or notes
- Survey questions or summaries of survey responses (Keep responses summary anonymous.)
- Newsletters or mass employee emails announcing changes or processes related to the work in the quarter of focus
- Flyers announcing employee retreats or trainings
- Screenshots of technology implementation to improve processes or provide training related to the quarter of focus
- Data reports or data dashboards
- Written research documents including research gathered from activities related to the focus quarter
- Workflows or timelines
- Copies of memorandum of understanding established with secondary education institutions related to pipeline creation.
- Any documentation reflecting work done during the quarter of focus that may not be included in the list above.