

WELL-BEING@WORK



Well-Being@Work Grants FY19-20

What are Well-Being Grants?

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Well-Being@Work Grants are a funding source for materials and services that support employee well-being.

Grants are funded by the SFHSS Operating budget and approved by the Well-Being Sponsors (CON, DHR, MYR, SFHSS)



Application Criteria and Review Process

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Application Criteria:

- Well-Being Champion
- Department Lead for Well-Being (recommended)
- Well-Being@Work Annual Plan for FY19-20 by June 2019

Review Process:

- The Well-Being Sponsors (HSS, DHR, MYR, CON) Review Committee evaluates the applications. Grants are approved based on the following criteria:
 - Potential impact to employee well-being
 - Availability of funds
 - Department need

How to Apply

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Step 1: Identify types of items to request

Step 2: Involve department Finance staff

Step 3: Complete and submit the Grant application



How to Apply: **STEP 1**

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Identify types of items to request

- **Who?** Key Leaders (Champions, the Department Lead for Well-Being*) and other stakeholders meet to discuss needs by work location.
- **What?** Materials or services to promote employee well-being.

*If your department does not have a Department Lead for Well-Being, Champions can work with members of their direct management on this process.

Items to Support Well-Being

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Examples:

- Bulletin boards
- Blood pressure machines
- Exercise equipment
- Ergo equipment
- Recreation equipment

How to Apply: **STEP 2**

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Involve department Finance staff

- **Who?** The Department Lead (and Champions if desired) will meet with the financial staff (department financial representative and/or CFO) to discuss for the request.
- **What?**
 - Confirm that funding isn't currently available for this purpose.
 - Secure support in coordinating the funding via work order from SFHSS (if approved) with departments finance staff
 - Support the purchase of the request (if approved)
 - Review Grant FAQs

Full list of FAQs can be found at:

<https://www.sfhss.org/resource/well-beingatwork-grant-faqs-2019>

- About the Grants
- Application and Review Process
- Financial Questions



How to Apply: STEP 3

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Complete and submit the application

Who? Department Lead and/or Champion will complete the applications.

Application can be found here:
<https://www.sfhss.org/resource/well-being-at-work-grant-application-2019>



Please follow the steps outlined below in order to complete the Grant Application.

- **Step 1: Identify types of items to request** – Key Leaders and other department stakeholders meet to discuss the well-being needs by work location and outline items to request.
- **Step 2: Involve department Finance staff** – Key Leaders meet with department financial staff to confirm whether funding is available, to review the FAQ's, secure support if funding is approved and/or to purchase the approved item(s).
- **Step 3: Complete the Grant application** – Applications are due August 16, 2019. If you would like to discuss your application prior to submission, please contact a Well-Being Coordinator at well-being@sfgov.org or call (415) 554-0643.

2019 GRANT APPLICATION INFORMATION

	Well-Being Champion	Department Lead for Well-Being	Department (Division/Sector) Director	Department Financial Representative	Department Accountant Representative
Name					
Department Code					
Job Title					
Work Address					
Work Phone					
E-Mail Address					



PROCESS AND DEADLINES IF AWARDED A GRANT

1. The Champion, Dept. Lead, and financial staff members indicated on the application will be notified in late September.
2. Approved Grant funds will be transferred to the department no later than October 31, 2019.
3. The funds must be spent by May 31, 2020.
4. The funds must be allocated against the work order by June 2020.
5. Recipients will be required to report back on the implementation of the grant no later than June of 2020. Failure to do so will impact future grant applications.

For maintenance or ongoing fees associated with the Grant items being request, the requesting department will be responsible for funding such fees.

CONFIRMATION AND REQUIRED SIGNATURES

By checking the boxes below, you certify that you have:

- ☐ Reviewed the Grant FAQ's as a team and understand the various supports roles each person will play.
- ☐ Confirmed no funds are available in the departments existing budget to pay for the items requested in this Grant application.
- ☐ An annual plan for well-being is created and in place for FY19-20.

By signing and submitting this application, you and agree to follow the above process if approved.

Well-Being Champion Signature

Department Lead for Well-Being Signature

Financial Representative Signature

Chief Financial Officer Signature

CHART
In the financial system, FSP, chartfields are nurr department, project, division, or cost center, the interdepartmental billing account code where the Finance personnel involved in the Well-Being Gi with their own Department's Finance/Accounting department's chart field and account code (581)

Fund	Department	Authority

How to Apply: STEP 3

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Complete Chart Fields (Page 1)

CHART FIELDS

In the financial system, FSP, chartfields are numeric strings of data used to identify a department, project, division, or cost center, the department's authority, and the interdepartmental billing account code where the Well-Being Grant entries will be made. Non-Finance personnel involved in the Well-Being Grants process should contact and work closely with their own Department's Finance/Accounting/Budget staff in order to acquire the performing department's chart field and account code (581xxx) information.

Fund	Department	Authority	Project	Activity	Account Code

EXAMPLE:

PS Field	Length	Required	Code	Description
GL Business Unit	5	Yes	SFGOV*	The Entire City Business Unit
Fund Code/ Fund Affiliate	5	Yes	17960	SFIA Operating Fund
GL Account	6	Yes	425990	Settlement Account
Department	6	Yes	228994	AIR General
Authority	5	Yes	10000	Operating
Project ID / Activity	8	Yes	10001767	Ac Airport Support Area
TRIO	6	Yes	100482	AIR_UNA
Agency Use	5	No	14136	GTU Customer Deposit

How to Apply: **STEP 3**

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Complete Grant Request (Page 3)

WHAT?

Describe what the requested funding will be used toward.

REQUESTED GRANT AMOUNT

Please select items from the approved list and include three quotes with your application. Quotes must include shipping/handling, taxes and installation where applicable. Please work with your finance team to identify city approved vendors in order to obtain a quote.]

If you are unable to obtain three quotes, please provide an explanation of the process you went through (who did you contact and when) to attempt to receive three quotes.

	Quote 1	Quote 2	Quote 3
Vendor Name			
Full Equipment	\$	\$	\$
Contracted Services	\$	\$	\$
Incentives	\$	\$	\$
Total	\$	\$	\$

How to Apply: **STEP 3**

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Provide Rationale for Grant Request (Page 4 - 5)

WHERE AND WHO?

Will this Grant be used for the entire department? Or is it for a particular worksite location? Specify the location and the number of people who work there. Explain who in the workplace will benefit from this Grant.

WHY?

How will this Grant impact employee well-being? How will this Grant will promote a workplace culture of well-being at your worksite?

How to Apply: **STEP 3**

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HOW?

How will this Grant be promoted to employees? If requesting equipment, how will you train your employees on use of the equipment and how will you support the ongoing use of it?

WHEN?

Provide a timeline describing the implementation plan.

SUSTAINABILITY?

Grant funds are an avenue to provide resources on a short – term basis. If maintenance or ongoing fees are associated, they will be covered by the department. Please describe your departments sustainability plan for maintaining what is being requested in the Grant application.

Review

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If you would like to discuss your application in advance with a Well-Being Coordinator, please email well-being@sfgov.org or call 415-554-0643



How to Apply: STEP 3

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Certify and Sign (Page 2)

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Well-Being Champion Signature

Department Lead for Well-Being Signature

Financial Representative Signature

Chief Financial Officer Signature



How to Apply: STEP 3

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Submit the Application by August 16, 2019.

- Email Well-Being@sfgov.org

WELL-BEING@WORK GRANT APPLICATION

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Fund	Department	Authority	Project	Activity	Account Code
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SAN FRANCISCO
HEALTH SERVICE SYSTEM

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WELL-BEING@WORK GRANT APPLICATION

PROCESS AND DEADLINES IF AWARDED A GRANT

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Well-Being Champion Signature _____

Department Lead for Well-Being Signature _____

Financial Representative Signature _____

Chief Financial Officer Signature _____

SAN FRANCISCO
HEALTH SERVICE SYSTEM

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Review Process Outcomes

- Approved for the full amount requested
- Approved with modifications
- Denied
- Encouraged to use department funding

Departments will be notified by early October via email.

- Webinar to follow



Approved Department Responsibilities

- Must use approved Grant to purchase items requested in Grant application
- Purchases must be completed between November 2019 – May 2020
- Purchasing and holding any contract, if applicable for the approved items/services
- If maintenance or ongoing fees are associated, they will be covered by the requesting department

Approved: Feedback

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Departments will be asked to provide feedback about the following:

- The Grant process: application, funding transfer, purchasing
- Implementation of the Grant – How is it being used? What has been the impact so far?
- Consider submitting department Spotlight

Failure to provide feedback will impact future requests



Timeline

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- Grant application due: Friday, August 16
- Review process: September
- Departments notified by: early October
- Funds transferred no later than: October 31
- Departments to purchase approved items: November – May
- Departments to bill SFHSS by: May 31

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- Financial Questions



Questions

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If you have additional questions, please email well-being@sfgov.org or call 415-554-0643

Download the slide deck at:
<https://www.sfhss.org//resource/well-beingatwork-grant-app-process-presentation2019>