

FY 2024 Annual Contract Evaluation and Recommendation for Continuation Funding (Contracts Closing)

Part II

Agency:

Program:

Contract Manager:

Contract is a Lead Agency with Collaborative Subcontractors Yes No

Contract Activities	Comments/Explanations should reflect best practices and plans to improve	Max Pts	Pts Awarded	Rater Initials																																																																																																			
<p>I. Service Level Achievement: <i>(# of participants served are in compliance with contract)</i></p>	<p>Performance on each contracted outcome is scored separately and summed.</p> <table border="1" data-bbox="590 467 1522 1062"> <thead> <tr> <th data-bbox="590 467 745 505">Service Level</th> <th colspan="10" data-bbox="745 467 1522 505"># of Outcomes</th> </tr> <tr> <td data-bbox="590 505 745 542"></td> <th data-bbox="745 505 823 542">1</th> <th data-bbox="823 505 900 542">2</th> <th data-bbox="900 505 978 542">3</th> <th data-bbox="978 505 1056 542">4</th> <th data-bbox="1056 505 1134 542">5</th> <th data-bbox="1134 505 1211 542">6</th> <th data-bbox="1211 505 1289 542">7</th> <th data-bbox="1289 505 1367 542">8</th> <th data-bbox="1367 505 1444 542">9</th> <th data-bbox="1444 505 1522 542">10</th> </tr> </thead> <tbody> <tr> <td data-bbox="590 542 745 618">95%-100% of target</td> <td data-bbox="745 542 823 618">12.0</td> <td data-bbox="823 542 900 618">6.0</td> <td data-bbox="900 542 978 618">4.0</td> <td data-bbox="978 542 1056 618">3.0</td> <td data-bbox="1056 542 1134 618">2.4</td> <td data-bbox="1134 542 1211 618">2.0</td> <td data-bbox="1211 542 1289 618">1.7</td> <td data-bbox="1289 542 1367 618">1.5</td> <td data-bbox="1367 542 1444 618">1.3</td> <td data-bbox="1444 542 1522 618">1.2</td> </tr> <tr> <td data-bbox="590 618 745 695">93%-94% of target</td> <td data-bbox="745 618 823 695">10</td> <td data-bbox="823 618 900 695">5</td> <td data-bbox="900 618 978 695">3.3</td> <td data-bbox="978 618 1056 695">2.5</td> <td data-bbox="1056 618 1134 695">2.0</td> <td data-bbox="1134 618 1211 695">1.7</td> <td data-bbox="1211 618 1289 695">1.4</td> <td data-bbox="1289 618 1367 695">1.3</td> <td data-bbox="1367 618 1444 695">1.1</td> <td data-bbox="1444 618 1522 695">1.0</td> </tr> <tr> <td data-bbox="590 695 745 771">91%-92% of target</td> <td data-bbox="745 695 823 771">8.0</td> <td data-bbox="823 695 900 771">4.0</td> <td data-bbox="900 695 978 771">2.7</td> <td data-bbox="978 695 1056 771">2.0</td> <td data-bbox="1056 695 1134 771">1.6</td> <td data-bbox="1134 695 1211 771">1.3</td> <td data-bbox="1211 695 1289 771">1.1</td> <td data-bbox="1289 695 1367 771">1.0</td> <td data-bbox="1367 695 1444 771">0.9</td> <td data-bbox="1444 695 1522 771">0.8</td> </tr> <tr> <td data-bbox="590 771 745 847">89%-90% of target</td> <td data-bbox="745 771 823 847">6.0</td> <td data-bbox="823 771 900 847">3.0</td> <td data-bbox="900 771 978 847">2.0</td> <td data-bbox="978 771 1056 847">1.5</td> <td data-bbox="1056 771 1134 847">1.2</td> <td data-bbox="1134 771 1211 847">1.0</td> <td data-bbox="1211 771 1289 847">0.9</td> <td data-bbox="1289 771 1367 847">0.8</td> <td data-bbox="1367 771 1444 847">0.7</td> <td data-bbox="1444 771 1522 847">0.6</td> </tr> <tr> <td data-bbox="590 847 745 924">87%-88% of target</td> <td data-bbox="745 847 823 924">4.0</td> <td data-bbox="823 847 900 924">2.0</td> <td data-bbox="900 847 978 924">1.3</td> <td data-bbox="978 847 1056 924">1.0</td> <td data-bbox="1056 847 1134 924">0.8</td> <td data-bbox="1134 847 1211 924">0.7</td> <td data-bbox="1211 847 1289 924">0.6</td> <td data-bbox="1289 847 1367 924">0.5</td> <td data-bbox="1367 847 1444 924">0.4</td> <td data-bbox="1444 847 1522 924">0.4</td> </tr> <tr> <td data-bbox="590 924 745 1000">85%-86% of target</td> <td data-bbox="745 924 823 1000">2.0</td> <td data-bbox="823 924 900 1000">1.0</td> <td data-bbox="900 924 978 1000">0.7</td> <td data-bbox="978 924 1056 1000">0.5</td> <td data-bbox="1056 924 1134 1000">0.4</td> <td data-bbox="1134 924 1211 1000">0.3</td> <td data-bbox="1211 924 1289 1000">0.3</td> <td data-bbox="1289 924 1367 1000">0.3</td> <td data-bbox="1367 924 1444 1000">0.2</td> <td data-bbox="1444 924 1522 1000">0.2</td> </tr> <tr> <td data-bbox="590 1000 745 1062">Below 85% of target</td> <td data-bbox="745 1000 823 1062">0.0</td> <td data-bbox="823 1000 900 1062">0.0</td> <td data-bbox="900 1000 978 1062">0.0</td> <td data-bbox="978 1000 1056 1062">0.0</td> <td data-bbox="1056 1000 1134 1062">0.0</td> <td data-bbox="1134 1000 1211 1062">0.0</td> <td data-bbox="1211 1000 1289 1062">0.0</td> <td data-bbox="1289 1000 1367 1062">0.0</td> <td data-bbox="1367 1000 1444 1062">0.0</td> <td data-bbox="1444 1000 1522 1062">0.0</td> </tr> </tbody> </table> <p><i>Enter Comments Here:</i></p>	Service Level	# of Outcomes											1	2	3	4	5	6	7	8	9	10	95%-100% of target	12.0	6.0	4.0	3.0	2.4	2.0	1.7	1.5	1.3	1.2	93%-94% of target	10	5	3.3	2.5	2.0	1.7	1.4	1.3	1.1	1.0	91%-92% of target	8.0	4.0	2.7	2.0	1.6	1.3	1.1	1.0	0.9	0.8	89%-90% of target	6.0	3.0	2.0	1.5	1.2	1.0	0.9	0.8	0.7	0.6	87%-88% of target	4.0	2.0	1.3	1.0	0.8	0.7	0.6	0.5	0.4	0.4	85%-86% of target	2.0	1.0	0.7	0.5	0.4	0.3	0.3	0.3	0.2	0.2	Below 85% of target	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	<p>12</p>	<p>Prelim (Prorated Q1-Q3) = Final (Q1-Q4) =</p>	
Service Level	# of Outcomes																																																																																																						
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<p>2. Outcomes or Contract Deliverables:</p> <p><i>(% of contracted outcome results achieved)</i></p> <p>Number of outcomes used to score:</p> <p>Check here if baseline data <input type="checkbox"/></p>	<p>Performance on each contracted outcome is scored separately and summed.</p> <table border="1" data-bbox="590 370 1522 1260"> <thead> <tr> <th data-bbox="590 370 747 407">Service Level</th> <th colspan="10" data-bbox="747 370 1522 407"># of Outcomes</th> </tr> <tr> <td data-bbox="590 407 747 444"></td> <th data-bbox="747 407 823 444">1</th> <th data-bbox="823 407 898 444">2</th> <th data-bbox="898 407 974 444">3</th> <th data-bbox="974 407 1050 444">4</th> <th data-bbox="1050 407 1125 444">5</th> <th data-bbox="1125 407 1201 444">6</th> <th data-bbox="1201 407 1276 444">7</th> <th data-bbox="1276 407 1352 444">8</th> <th data-bbox="1352 407 1428 444">9</th> <th data-bbox="1428 407 1522 444">10</th> </tr> </thead> <tbody> <tr> <td data-bbox="590 444 747 521">95%-100% of target</td> <td 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target	7.8	3.9	2.6	1.95	1.56	1.3	1.11	0.98	0.87	0.78	86% of target	5.2	2.6	1.73	1.3	1.04	0.87	0.74	0.65	0.58	0.52	85% of target	2.6	1.3	0.87	0.65	0.52	0.43	0.37	0.33	0.29	0.26	Below 85% of target	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26	Final (Q1-Q4) =	
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<p>3. Data Integrity Check</p> <p>Check here if data was corrected <input type="checkbox"/></p> <p>Date:</p>	<p>Check One: (Accuracy of Sample = # Correct Data Elements/Total # Data Elements)</p> <p>___ 95% - 100% accuracy (12 points)</p> <p>___ 90% -94% accuracy (8 points)</p> <p>___ Less than 90% accuracy (0 points)</p> <p>Score 1 point for each:</p> <p>___ Administration of all measures follows measurement tool protocol/guidelines or program evaluation procedures (1 point)</p> <p>___ Completed measures contain all necessary information for participant identification (1 point)</p> <p>___ Completed measures contain all necessary information including documentation for accurate scoring (1 point)</p> <p><i>Enter Comments Here:</i></p>	<p>15</p>		
<p>4. Fiscal Reporting and Reimbursements (through Q3): (Deduct from total points allowable the % of those reimbursement forms and budget to actual reports received without accurate information and budget to actual reports not received on time by total number of reports received).</p>	<p>___ Reimbursement requests contain accurate information. (0, 1, 2 or 3 points)</p> <p>___ Budget to actual reports were received by the deadline. (0 or 1 point)</p> <p>___ Budget to actual reports contain accurate information. (0 or 1 point)</p> <p>N/A Next FY budget was submitted for contract by deadline. (0, 1 or 2 points)</p> <p>N/A Next FY budget submitted in accordance with instructions and without major revisions. (0, 1 or 2 points)</p> <p><i>Enter Comments Here: N/A – Contract ended 9/30/2024</i></p>	<p>5</p>		
<p>5. Compliance with General Terms and Conditions (activities through July 31st):</p>	<p>___ Timely notification of loss of other Program funds. (1 point)</p> <p>___ CBHC prior approval for spending outside of the budget. (0, 1, or 2 points)</p> <p>___ CBHC obtained contract notifications or pre-approved contract changes. (0, 1, or 2 points)</p> <p>___ Most current agency audit submitted on time (1 point).</p> <p><i>Enter Comments Here:</i></p>	<p>6</p>		

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Part II

Contract Activities	Comments/Explanations should reflect best practices and plans to improve	Max Pts	Pts Awarded	Rater Initials
6. The provider submits reimbursement requests on a monthly basis and in a timely fashion. (activities through July 31 st):	<p><input type="checkbox"/> The provider is consistently more than one month behind in submitting reimbursement requests. (0 points)</p> <p>or</p> <p><input type="checkbox"/> The provider consistently submits a reimbursement request for a given month by the last day of the following month. (1 point)</p> <p>or</p> <p><input type="checkbox"/> The provider consistently submits a reimbursement request for a given month by the 15th day of the following month. (2 points)</p> <p><i>Enter Comments Here:</i></p>	2		

Score Summary	Additional Comments	Max Pts	Pts Awarded	Rater Initials
Preliminary Points Part II	<i>Special Note: Omit Section 2 when scoring.</i> <i>Enter Additional Comments Here: Contract ended 9/30/2024.</i>	40		
Total Score from Part I	<i>Part I Score</i>	30		
Total Preliminary Score	<i>Part I + Preliminary Part II Scores based on maximum score of 70</i>	70		
Final Points Part II	<i>Enter Additional Comments Here: Scores based on Max Pts of 66</i>	66		
Total Final Score	<i>Part I + Part II Scores based on maximum score of 96</i>	96		

Preliminary Recommendation (points adjusted to reflect maximum score of 70 points)

- Continue funding effective October 1 (*Total score result is 60 points or higher*)
- Continue funding effective October 1 – may include a contract modification(s) (*Total score is between 50 and 59 points*)
- Continue funding effective October 1 – may include Provider Improvement Plan process (*Total score is less than 49 points*)

Final Recommendation (points adjusted to reflect maximum score of 96 points)

- Continue funding effective October 1 (*Total score result is 81 points or higher*)
- Continue funding effective October 1 – may include contract modification(s) (*Total score is between 66 and 80 points*)
- Continue funding effective October 1 – may include Provider Improvement Plan process (*Total score is less than 66 points*)
- Other Determination

FY 2024 Annual Contract Evaluation and Recommendation for Continuation Funding (Contracts Closing)

Part II

CBHC Review by 9/30	Comments/Explanations should reflect best practices and plans to improve
<p>7. Agency Audit <i>(for direct contracts and lead agencies only)</i></p>	<p><u>Check one (If opinion status not selected, comments required):</u> <input type="checkbox"/> Unmodified opinion with no comments or findings <input type="checkbox"/> Unmodified opinion with comments <input type="checkbox"/> Unmodified opinion with findings <input type="checkbox"/> Qualified opinion <i>Enter Comments Here:</i></p>
<p>8. ASO Provider Monitoring <i>Check here if not applicable <input type="checkbox"/></i></p>	<p><u>Indicate “yes” or “no” for each item:</u> <input type="checkbox"/> Adherence to ASO Policies and Procedures <input type="checkbox"/> Service or support tied back to a family support plan. Indicate % _____ <input type="checkbox"/> Documentation found in client file to substantiate ASO expenditures <input type="checkbox"/> Funds returned if any. Indicate \$ amount _____ If any of these objectives were not met, please briefly describe: <i>Enter Comments Here:</i></p>
<p>9. Provider Improvement Plan</p>	<p><u>Check one:</u> <input type="checkbox"/> Not Applicable <input type="checkbox"/> Completed Successfully <input type="checkbox"/> Not Completed Successfully <input type="checkbox"/> In Progress (continuing into next fiscal year)</p>

Did Agency Audit, ASO or Provider Improvement Plan results change continuation funding recommendation? Yes No

- Continue funding effective October 1
- Continue funding effective October 1 – may include contract modification(s)
- Continue funding effective October 1 – may include Provider Improvement Plan process
- Other Determination

Enter Comments Here:

FY 2024 Annual Contract Evaluation and Recommendation for Continuation Funding (Contracts Closing)

Part II
Projected Funding Allocation

FY 2024 Contract Amount: \$

ASO Allocation: \$

FY 2025 Continuation Contract Amount: \$

ASO Allocation: \$

Explain any amount difference including impact to program or if contract is ending (i.e. changes to service levels, outcomes and/or ASO allocations)

Enter Comments Here:

Type of Contract: Investment (more than \$800,000)

Uniting (\$75,000 – \$799,999)

Leading (\$5,000 - \$74,999)

Contract/Program Manager Signature and Date: _____

Director of Finance Signature and Date: _____

Director of Programs Signature and Date: _____

FY 2024 Annual Contract Evaluation and Recommendation for Continuation Funding (Contracts Closing)

Part II

Contract Activities through 9/30	For Lead Agent with funded sub-contracts only (calculate separately from final score):			
Collaborative functioning / Lead Agent Compliance: Check if not applicable <input type="checkbox"/>	<p>Score 0 or 1 for each: Programmatic Subtotal: ____</p> <p>____ Cooperation – Evidence that partnership improves service delivery. <i>Enter Example Here:</i></p> <p>____ Coordination – Combined resources to maximize operational efficiencies. <i>Enter Example Here:</i></p> <p>____ Collaboration – Collectively applying a pool of seamless resources to meet family outcomes (including but not limited to collaborative staff training). <i>Enter Example Here:</i></p> <p>____ Sharing staff across partnership to meet program needs and goals. <i>Enter Example Here:</i></p> <p>____ Subcontractor personnel included in CBHC contract negotiations.</p> <p>Score 5 if yes for ALL items, 0 if not. Place “X” if done. Contractual Subtotal: ____</p> <p>____ Lead informs subcontractors of CBHC notifications, requests or meeting notices. ____ Lead agent and subcontractor representatives attend CBHC training and/or meetings. ____ Subcontract agreements were executed and included all applicable special conditions and CBHC General Terms and Conditions as an attachment. ____ Subcontract agreements submitted to CBHC within 30 days of contract execution. ____ Lead agent completed sub-contractor(s) fiscal site visits. <i>Enter Comments Here:</i></p>	<p>Max 10</p>	<p>Pts Awarded</p>	<p>Rater Initial</p>

Maintain Lead Agency Status: YES NO if no, explain:

Maintain All Sub-Contract Status: YES NO if no, explain:

Enter Comments Here:

____ Score of 7 -10 indicates good standing

____ Score of 6 or below indicates need to address areas of improvement with a collaborative action plan