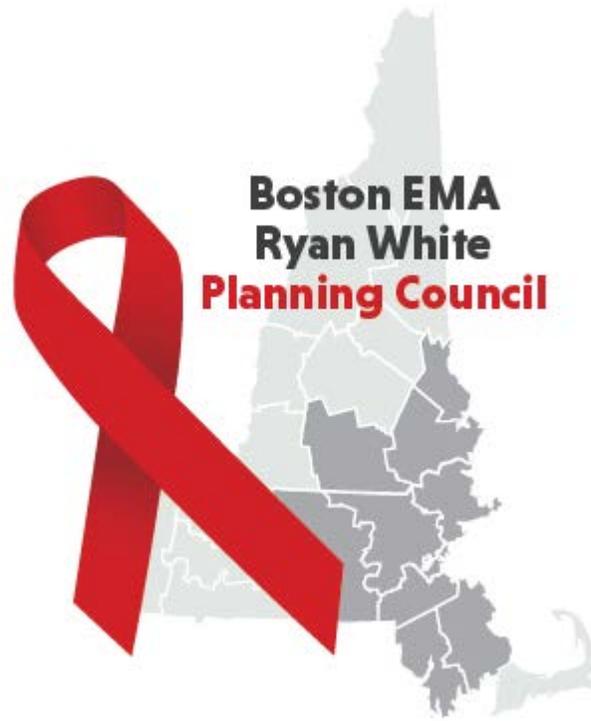


# **Boston EMA Ryan White Planning Council**



## **ASSESSMENT OF ADMINISTRATIVE MECHANISM**

**2019 – 2020**

July 2020

Planning Council Support  
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Boston, MA 02118  
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## **Assessment of Administrative Mechanism**

### **I. Background**

The Health Resources and Services Administration (HRSA) requires that all Ryan White Part A Planning Councils conduct an annual assessment of the administrative mechanism (AAM) to evaluate how efficiently and rapidly grantees disburse funding to the areas of greatest need within the eligible metropolitan area (EMA). The purpose of the survey is to evaluate the degree to which providers were satisfied with BPHC's administration of Ryan White Part A funding. The Boston EMA Ryan White Planning Council's role was to review the survey results and provide recommendations to BPHC in areas where improvements were necessary.

The Services, Priorities, and Evaluation Committee (SPEC) committee is charged with executing the AAM. The committee decided last year to divide the AAM into two parts – one survey that focuses on Procurement and one survey that focuses on Disbursement of Funds. The purpose of this is to schedule the survey to align with the time frame for each of the two processes so providers are more likely to complete the survey. The procurement section of the AAM focused on the Request for Proposal (RFP), competitive bidding process and internal/external grant proposal reviews while the second on the creation of contracts, purchase orders, receipts of monthly invoices and 30-day turnaround for reimbursements. Part I was sent out in March, while Part II was sent out in April, with a final collection and analysis conducted in May. The final results and recommendations were presented to Planning Council on May 14<sup>th</sup>, 2020, and voted on by the Council on June 11<sup>th</sup>, 2020.

### **II. Methodology**

Planning Council Support (PCS) staff distributed both surveys online through Survey Monkey. On March 9<sup>th</sup>, 2020, PCS staff emailed the Part I survey link to all 13 Part A-funded agencies who had submitted an RFP during the most recent procurement cycle, while Part II was subsequently sent out to all 34 Part A funded agencies on April 3<sup>rd</sup> with final deadline for each of May 1<sup>st</sup>. Part I included 22 multiple choice and open-ended questions focused on evaluating procurement and Part II included 15 similarly formatted questions assessing disbursement and the contract monitoring processes administered by BPHC during FY19. For the first survey, 8 agencies (62%) responded while 18 providers (67%) completed the second. During the 2019-2020 term, the SPEC committee analyzed the results and created specific recommendations for each section, as shown in this report (see Page 4 for survey results).

### **III. Summary of Findings**

#### ***A. Questions***

The introductory section of Part I comprised of three questions: Question 1 asked for the agency's name (only visible to PCS for tracking purposes), Question 2 asked which service categories were funded by Part A for their respective agencies and Question 3 asked how many service categories they were funded for. The following questions included any gaps in funding, if they'd responded to an AAM in the past two years and any suggestions for a more efficient funding process. Part II asked for the agency's name, how clear the recipient found the scope of services for their funded program, followed by questions about budget revision training, the funding process and the Bidders Conference. The majority of responses were generally positive, though any constructive feedback was discussed by SPEC and resulted in AAM recommendations (see Page 37).

## ***B. Procurement***

### **PART I | PROCUREMENT**

**Distributed to All Part A-Funded Agencies Who Submitted an RFP in 2019 | March 9<sup>th</sup>, 2020**

**Final Collection and Analysis of Results | May 1<sup>st</sup>, 2020**

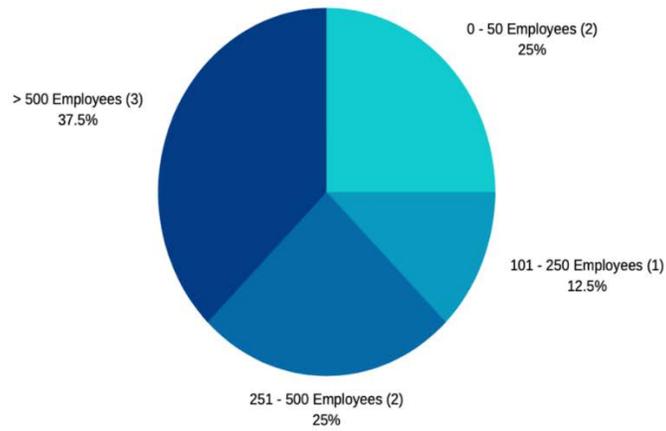
**Total Responses | 8 out of 13 (62%) agencies who submitted an RFP completed the survey**

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Q1: Agency Name \_\_\_\_\_

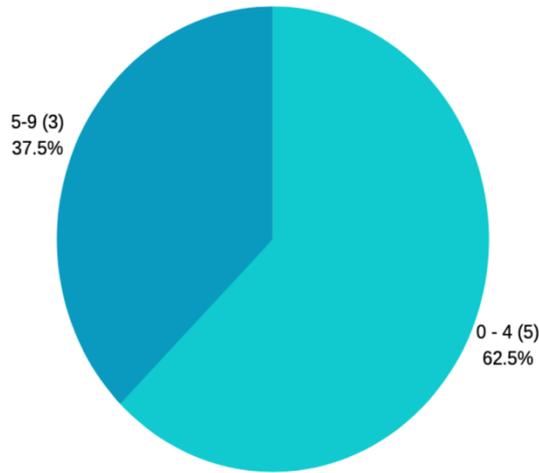
**(Only visible to PCS for tracking of any outstanding agencies who still needed to respond)**

Q2: What is the size of your agency?



Answered: 8 Skipped: 0

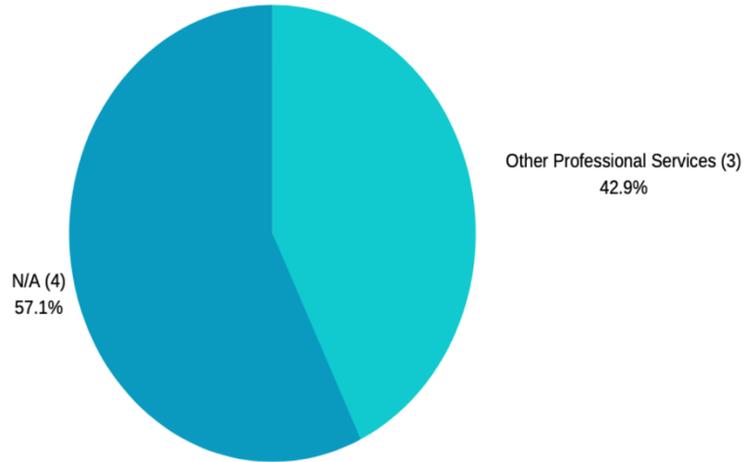
**Q3: How many Boston EMA Part A service categories were you funded for in FY 2019 (Mar 1, 2019 - Feb 29, 2020)?**



Answered: 8 Skipped: 0

0-4	62.50%	5
5-9	37.50%	3
10+	0.00%	0
Other (please specify)	0.00%	0
Total Respondents: 8		

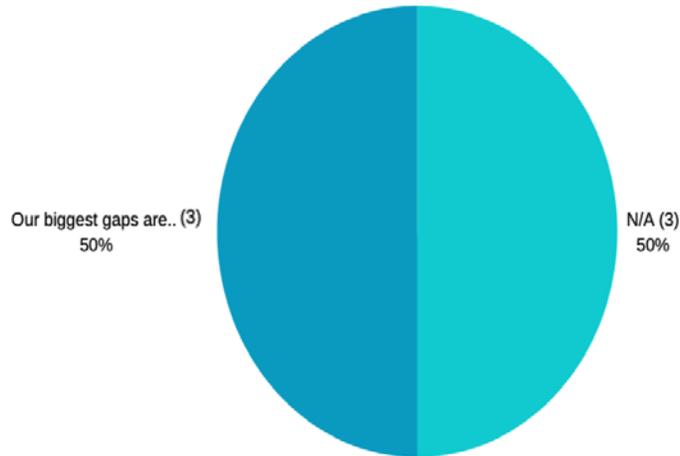
**Q4: Which MAI (Minority AIDS Initiative) service categories were you funded for in FY 2019 (Mar 1, 2019 - Feb 29, 2020)?**



Answered: 7 Skipped: 1

ANSWER CHOICES	RESPONSES
Linguistic Services	0.00% 0
Other Professional Services	42.86% 3
N/A	57.14% 4
<b>TOTAL</b>	<b>7</b>

**Q5: Are there gaps in funding at your agency, specifically with regard to Ryan White Part A services? If so, please explain.**



Answered: 6 Skipped: 2

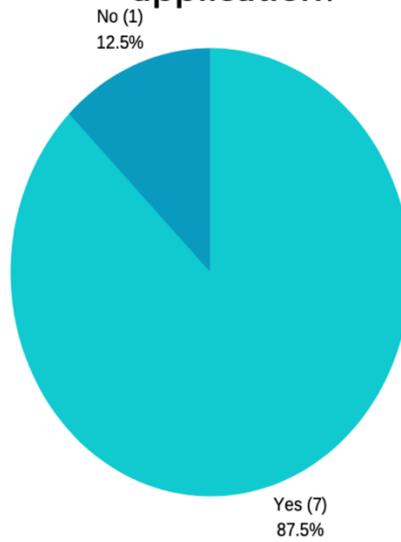
#### **OUR BIGGEST GAPS ARE...**

Not enough funding to sustain our substance use residential services; not adequate funding to support our meals program

Funding for another nonmedical case manager is needed and has been requested since 11/2019 but we have not been able to receive any additional funds

Our biggest concern in meeting up with the demand for Emergency Financial Assistance, Medical transportation, and food for psychosocial peer support groups.

**Q6: Did you apply for funding for FY 2020?  
If not, what prevented you from submitting an  
application?**

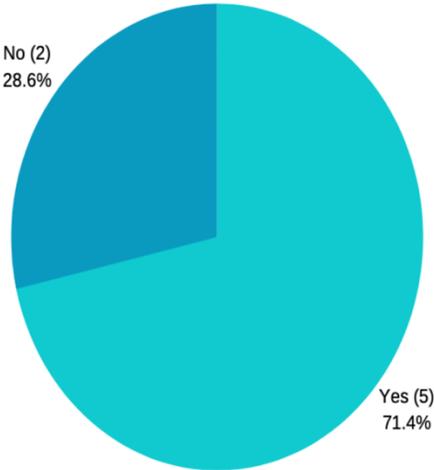


Answered: 8 Skipped: 0

**IF NO, WHY?**

service categories that were offered were not relevant to our agency

**Q7: Did you respond to the AAM Survey in the past two years? If not, why?**



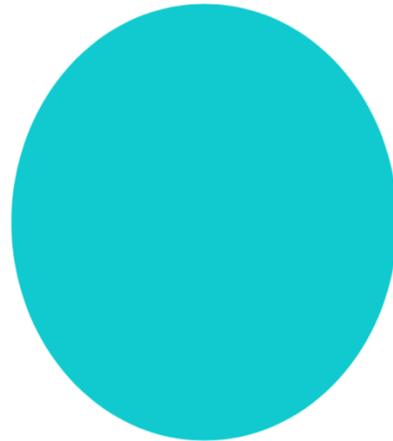
Answered: 7 Skipped: 1

**IF NOT, WHY?**

I'm not sure if the agency did or not

stared 11/19

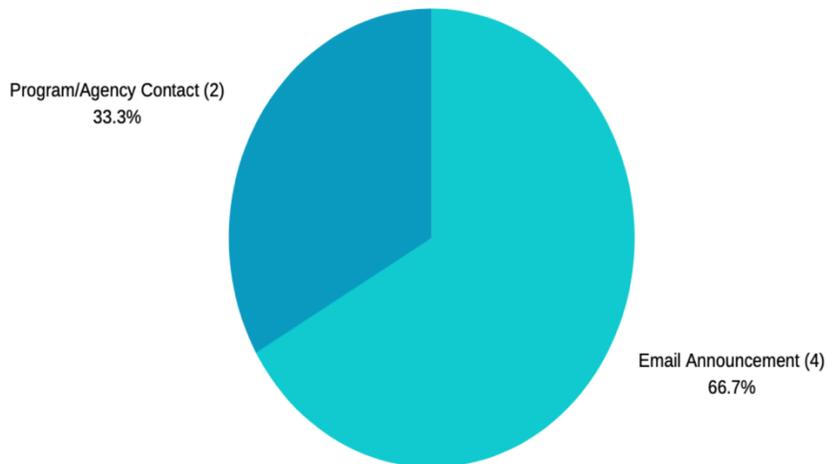
**Q8: Were you aware that the most recent RFP was released on November 18th, 2019?**



Yes (6)  
100%

Answered: 6 Skipped: 2

**Q9: How did your agency learn that the last Boston Public Health Commission (BPHC) Ryan White Part A RFP was available?**



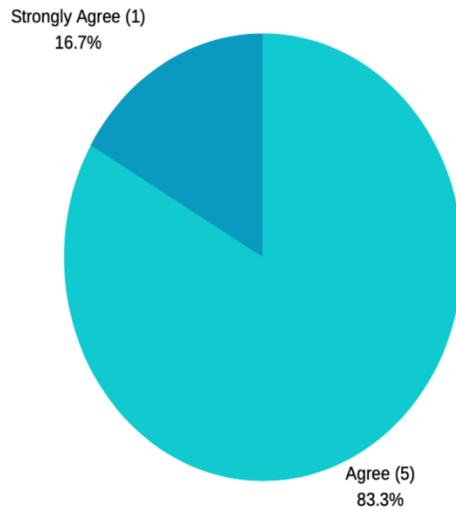
Program/Agency Contact (2)  
33.3%

Email Announcement (4)  
66.7%

Answered: 6 Skipped: 2

ANSWER CHOICES	RESPONSES	
BPHC Website	0.00%	0
Newspaper Advertisement	0.00%	0
Email Announcement	66.67%	4
Program/Agency Contact	0.00%	0
Social Media Announcement	0.00%	0
Program/Agency Contact	33.33%	2
Other (Please Specify)	0.00%	0
<b>TOTAL</b>		<b>6</b>

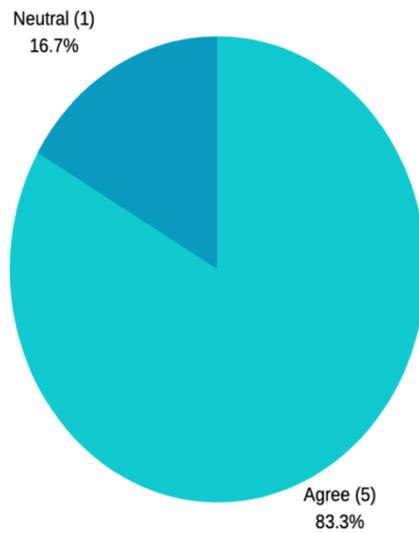
**Q10: BPHC provides bidders with adequate information on applying for funding.**



Answered: 6 Skipped: 2

ANSWER CHOICES	RESPONSES	
Strongly Agree	16.67%	1
Agree	83.33%	5
Neutral	0.00%	0
Disagree	0.00%	0
Strongly Disagree	0.00%	0
TOTAL		6

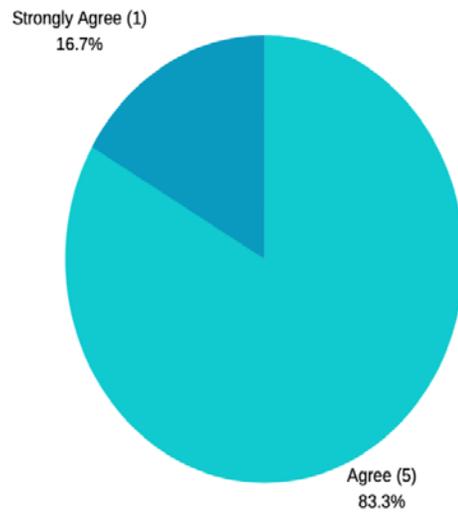
**Q11: BPHC conducts an open and competitive procurement process.**



Answered: 6 Skipped: 2

ANSWER CHOICES	RESPONSES	
Strongly Agree	0.00%	0
Agree	83.33%	5
Neutral	16.67%	1
Disagree	0.00%	0
Strongly Disagree	0.00%	0
TOTAL		6

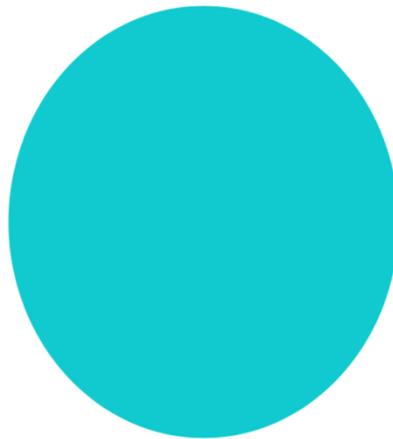
**Q12: The standardized procedures and requirements for funding were made clear.**



Answered: 6 Skipped: 2

ANSWER CHOICES	RESPONSES	
Strongly Agree	16.67%	1
Agree	83.33%	5
Neutral	0.00%	0
Disagree	0.00%	0
Strongly Disagree	0.00%	0
TOTAL		6

**Q13: The RFP clearly described the criteria and procedures for reviewing proposals.**

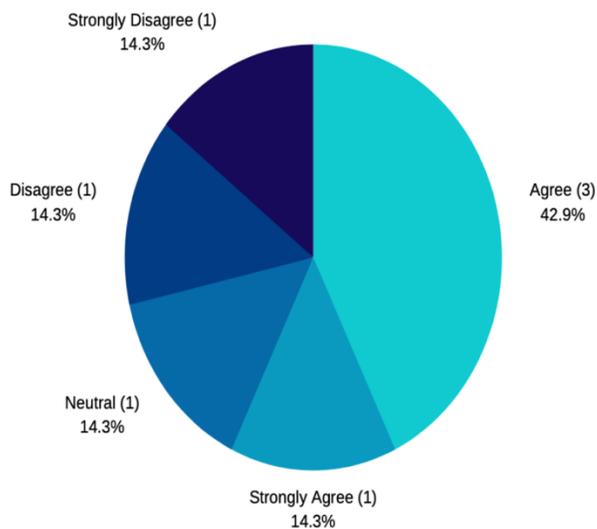


Agree (6)  
100%

Answered: 6 Skipped: 2

ANSWER CHOICES	RESPONSES	
Strongly Agree	0.00%	0
Agree	100.00%	6
Neutral	0.00%	0
Disagree	0.00%	0
Strongly Disagree	0.00%	0
TOTAL		6

**Q14: The MAI RFP process was clear and straightforward.**



Answered: 7 Skipped: 1

ANSWER CHOICES	RESPONSES	
Strongly Agree	14.29%	1
Agree	42.86%	3
Neutral	14.29%	1
Disagree	14.29%	1
Strongly Disagree	14.29%	1
TOTAL		7

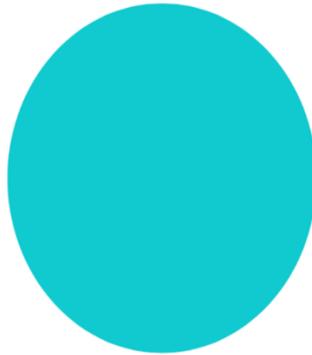
**I DISAGREE/STRONGLY DISAGREE DUE TO THE FOLLOWING REASON(S)...**

It was not clear, until pressed with questions in the bidder's conference, that the funds related to this RFP were not "additional" money, rather funds that consisted of some money not awarded in the previous RFP...or more importantly they were funds already awarded to agencies, that needed to be re-bid on...and, because of the newly added services, some agencies were going to receive cuts to their funding

**SPEC RECOMMENDATION**

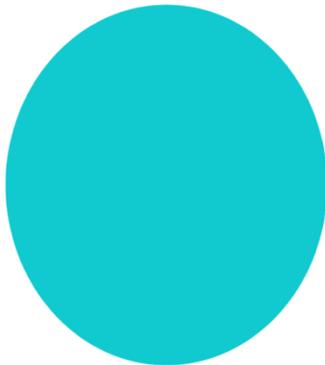
**Clearer language on MAI and what it may fund**

**Q15: The RFP clearly stated expectations, including Federal HRSA/HAB policies and procedures, standards of care that must be met, expected performance measures, and program and reporting requirements.**

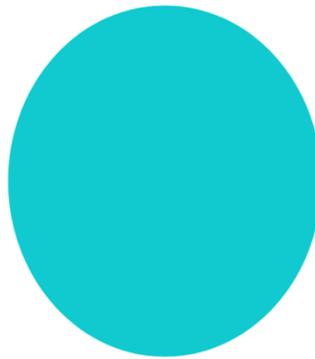


[POLICIES AND PROCEDURES] Yes  
100%

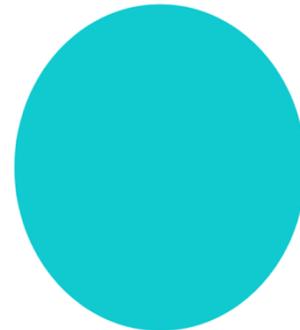
Answered: 6 Skipped: 2



[STANDARDS OF CARE] Yes  
100%



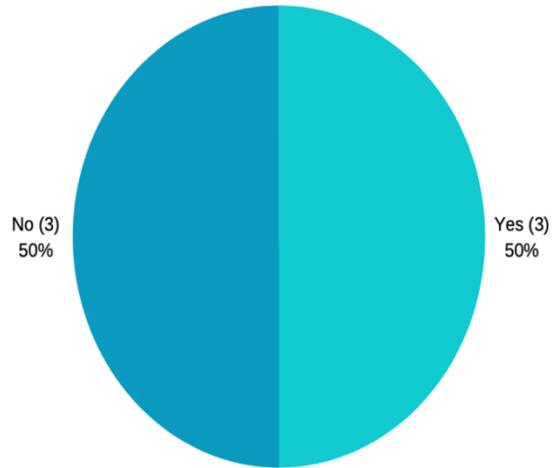
[EXPECTED PERFORMANCE MEASURES] Yes  
100%



[PROGRAM AND REPORTING REQUIREMENTS] Yes  
100%

Answered: 6 Skipped: 2

**Q16: Was sufficient time allotted to the RFP process?**



Answered: 6 Skipped: 2

**IF NO, HOW MUCH TIME WOULD YOU HAVE PREFERRED?**

It would have been better to have the proposal due at a different time of year....although I know that may not have been possible for this cycle.

---

6 weeks

**Q17: What 2 suggestions would you offer to improve the RFP document?  
(If N/A, please leave blank)**

**SUGGESTION 1**

We should have more time than 30 days to do it.

**SUGGESTION 2**

There are no responses.

**SPEC RECOMMENDATION**

**A minimum of 6 weeks allotted for agencies to submit an RFP**

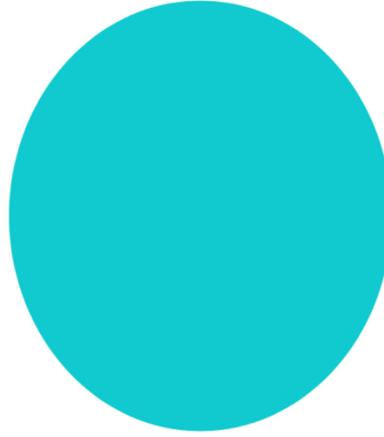
Answered: 1 Skipped: 7

**Q18: What 2 suggestions would you offer to improve the RFP process?  
(If N/A, please leave blank)**

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There are no responses.

**Q19: If translation services were to be provided, which language(s) would be useful to complete the RFP?**

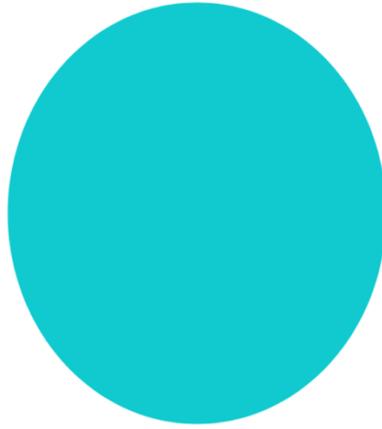


Spanish (1)  
100%

Answered: 1 Skipped: 7

ANSWER CHOICES	RESPONSES	
Spanish	100.00%	1
Portuguese	0.00%	0
Mandarin Chinese	0.00%	0
Haitian Creole	0.00%	0
Vietnamese	0.00%	0
Other (Please Specify)	0.00%	0
Total Respondents: 1		

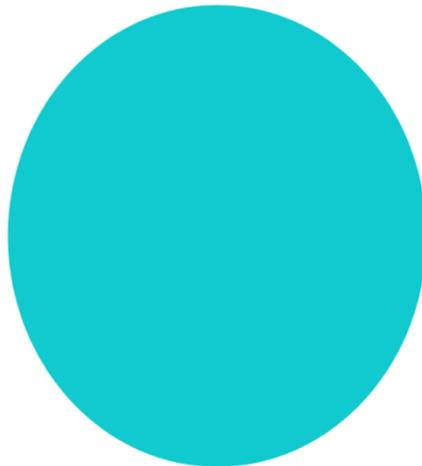
**Q20: If you attended the online bidders conference, were your questions answered?**



Yes (5)  
100%

Answered: 5 Skipped: 3

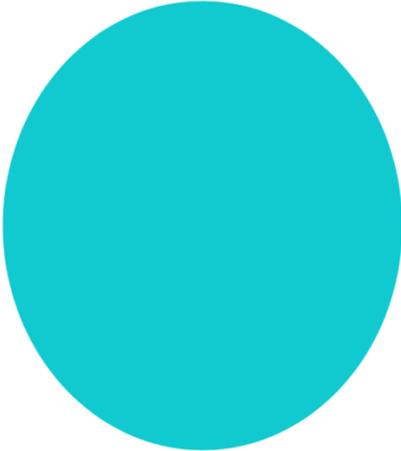
**Q21: If No, what where your questions?**



No (2)  
100%

Answered: 2 Skipped: 6

Q22: Was the length of the webinar adequate?



Yes (5)  
100%

Answered: 5 Skipped: 3

*C. Disbursement of Funds*

**PART II | DISBURSEMENT OF FUNDS**

Distributed to All Part A-Funded Agencies | April 3<sup>rd</sup>, 2020

Final Collection and Analysis of Results | May 1<sup>st</sup>, 2020

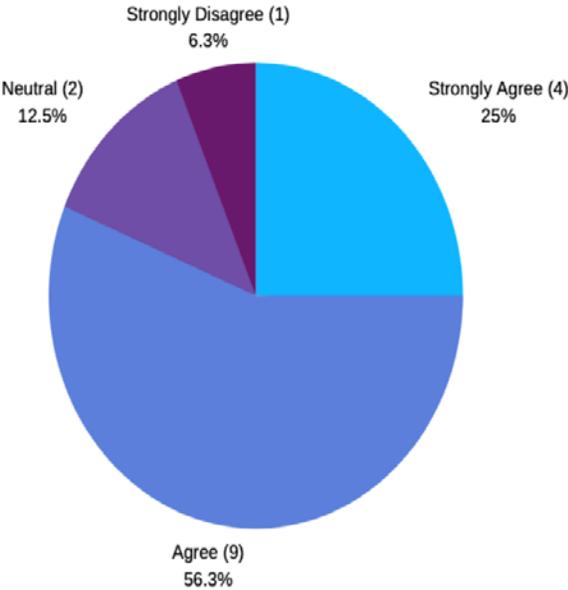
Total Responses | 18 out of 27 **(67%)** agencies who received Part A funding with 2 additional staff responses

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**Q1: Agency Name \_\_\_\_\_**

**(Only visible to PCS for tracking of any outstanding agencies who still needed to respond)**

**Q2: BPHC provides a clear scope of service for each contract.**



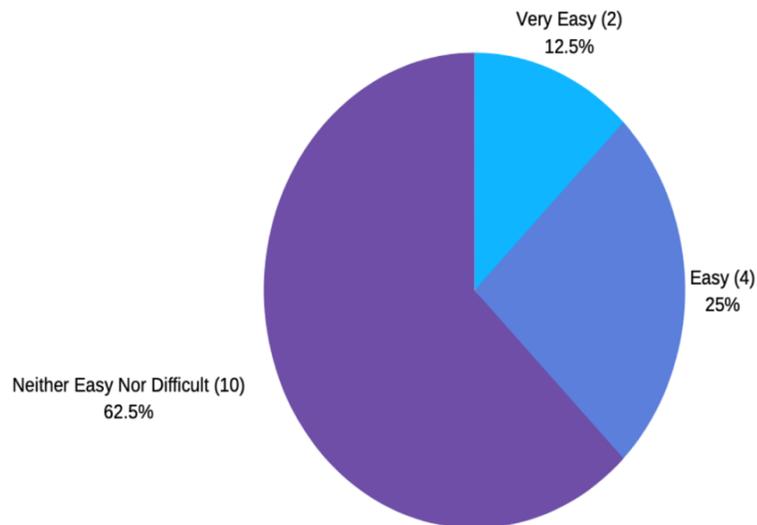
Answered: 16 Skipped: 4

ANSWER CHOICES	RESPONSES	
Strongly Agree	25.00%	4
Agree	56.25%	9
Neutral	12.50%	2
Disagree	0.00%	0
Strongly Disagree	6.25%	1
<b>TOTAL</b>		<b>16</b>

**I DISAGREE/STRONGLY DISAGREE DUE TO THE FOLLOWING REASON(S)...**

They combined scopes and issues no guidance on documentation for each scope. We were not sent much of the info we required

**Q3: This year, agencies were able to submit Request for Proposals (RFPs) online.  
How did you find the process?**



Answered: 16 Skipped: 4

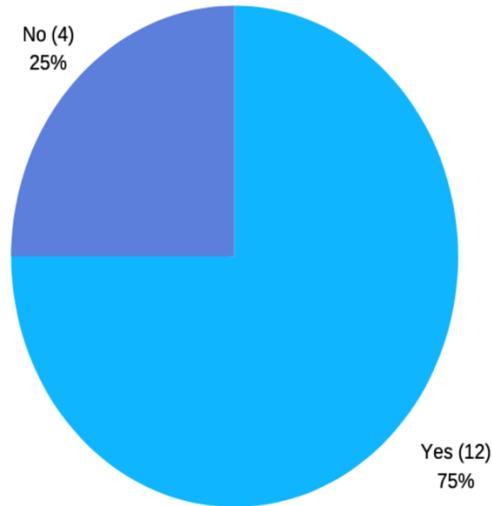
ANSWER CHOICES	RESPONSES	
Very easy	12.50%	2
Easy	25.00%	4
Neither easy nor difficult	62.50%	10
Difficult	0.00%	0
Very difficult	0.00%	0
<b>TOTAL</b>		<b>16</b>

**Q4: What 2 suggestions would you offer to improve the disbursement process?**

1.
  - Ensuring the budget in the contract matches the budget submitted to BPHC
  - Sending monthly disbursement information / details to the fiscal accountant in addition to VP of Fin & Admin
  - clarity
  - Give more time to submit the proposal
2.
  - Shortening the time between budget revision submission and approval
  - receive on time updates
  - Have word friendly and editable documents.
- N/A**
  - n/a
  - neutral
  - didn't submit
  - NA

Answered: 4 Skipped: 12

**Q5: Do you feel properly trained to do a budget revision?**



Answered: 16 Skipped: 4

**IF NOT, WHY?**

My account does budget revisions with my input and approval

I do not do our agencies budget revision

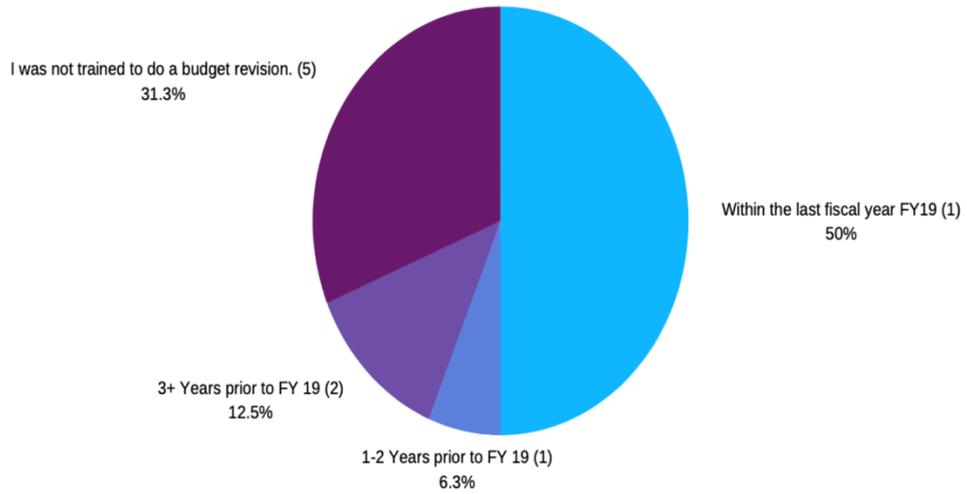
I only had this position as a Medical Case Manager for 6 months and I don't know if I need to be trained and /or do I have to. Before the date of webinar, I will find out.

I do it with the help of our accounts officer.

**SPEC RECOMMENDATION**

**BPHC to offer a budget revision training to not only the agency's fiscal department but also staff overseeing the program**

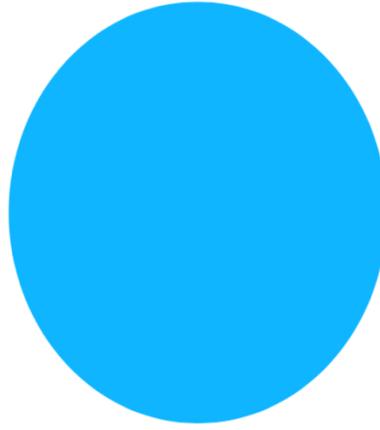
**Q6: When were you last trained to do a budget revision?**



Answered: 16 Skipped: 4

ANSWER CHOICES	RESPONSES	
I am currently being trained.	0.00%	0
Within the last fiscal year (FY19)	50.00%	8
1-2 years prior to FY19	6.25%	1
3+ years prior to FY19	12.50%	2
I was not trained to do a budget revision.	31.25%	5
<b>TOTAL</b>		<b>16</b>

**Q7: Would a checklist be helpful to standardize the budget revision?**



Yes (16)  
100%

Answered: 16 Skipped: 4

**Q8: What circumstances at your program might require you to submit a budget revision?**

**RESPONSES**

Change in staffing, client needs, staff needs

Employee changes and update new salary.

If we have a new staff member or are reallocating budget from a non-personnel line

Change in Staff, change in actual spending costs vs originally budgeted, change in facility allocation based on program physical moves, increase or decrease in funding, etc.

Staffing changes

change in staffing, change in salaries, reallocation of nonpersonnel costs, change in fringe rate, reallocation of FTEs

change in personnel

Unanticipated programmatic needs.

staff changes

For that answer I would need to speak to the director.

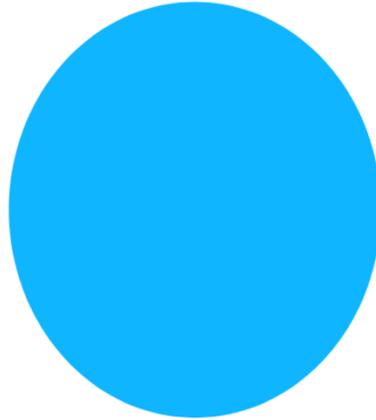
When we have changes in personnel and below the line spending.

Under current situation with dental offices closed except for emergencies we will have to review our budget once they open and we assess the cost of treatment

Ability to spend more on drug reimbursement after the sweeps process

Answered: 13 Skipped: 7

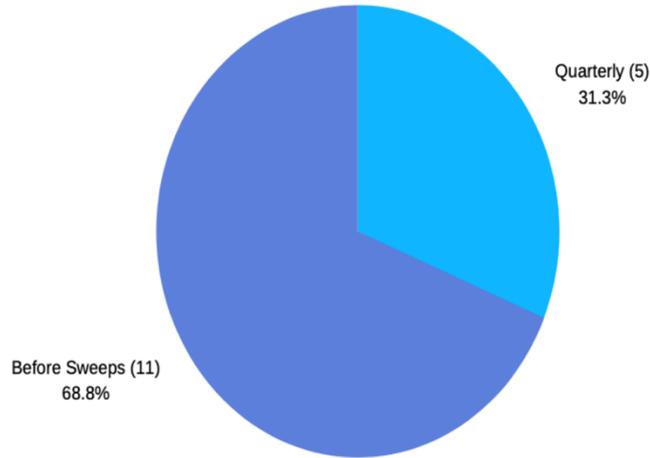
**Q9: Would you use a checklist provided by BPHC to maintain quality control of that submission?**



Yes (15)  
100%

Answered: 15 Skipped: 5

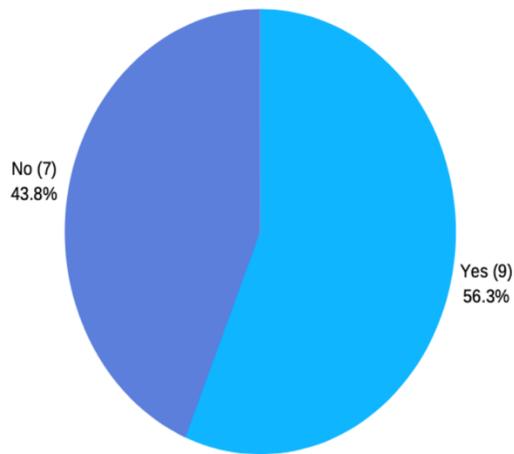
**Q10: Should we re-visit trainings related to budget revisions quarterly or before sweeps?**



Answered: 16 Skipped: 4

**SPEC RECOMMENDATION**  
**Continue to offer budget revision training quarterly and record it for future reference**

**Q11: Would a quarterly conference call or webinar be useful for budget revisions?**



Answered: 16 Skipped: 4

**Q12: How long did it take BPHC to provide you with your PO number after returning the contract?**

**RESPONSES**

2 months I think - it was a year ago!

We are still waiting for our PO so it has been quite a long time

I don't recall the time span but they were received a week before due date of 1st billing for the month of March 2020.

N/A

don't remember

went to fiscal

I'm not sure. It was not delayed, though.

need to speak to director

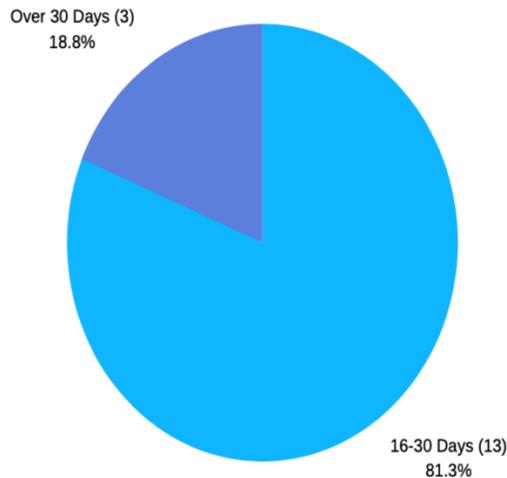
I guess within one month.

not sure

1 month

Answered: 12 Skipped: 8 I don't recall

**Q13: What is the average turnaround time once a complete invoice is submitted for BPHC to reimburse your agency?**



Answered: 16 Skipped: 4

ANSWER CHOICES	RESPONSES	
7-15 days	0.00%	0
16-30 days	81.25%	13
Over 30 days	18.75%	3
TOTAL		16

**SPEC RECOMMENDATION**  
**Provide additional monitoring standards on how PO numbers are issued**

**IF OVER 30 DAYS, PLEASE PROVIDE A BRIEF EXPLANATION AS TO WHY:**

Unsure why, but we needed to make several requests for invoices submitted 4th quarter; many requests required to have invoices for a CQI minigrant to be processed.

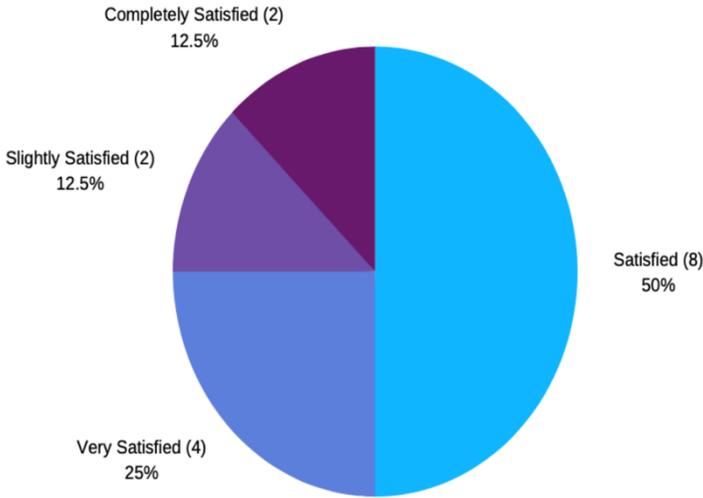
██████████ acts as out fiscal agent which sometimes delays reimbursement.

It typically does not take over 30 days, it has on occasion but once follow up with fiscal it is paid out pretty quickly after the follow up

since we are part of BPHC we follow their schedule

**SPEC RECOMMENDATION**  
**Provide SPEC with more information on how BPHC issues PO numbers for the committee to better target survey questions**

**Q14: Overall, how satisfied are you with BPHC's administration of Ryan White Part A funds?**



Answered: 16 Skipped: 4

NOT AT ALL SATISFIED	SLIGHTLY SATISFIED	SATISFIED	VERY SATISFIED	COMPLETELY SATISFIED	TOTAL
0.00%	12.50%	50.00%	25.00%	12.50%	
0	2	8	4	2	16

**Q15: Is there anything else that may be helpful in assessing the administrative mechanism in place for the Boston EMA?**

**RESPONSES**

I just learned about this survey during the Provider Conference on April 30. I just learned about the Provider Conference on April 30 as well. I was told the email went out via RWSD e-blast. None of us at [REDACTED] including fiscal, seem to be on the RWSD email blast list. I have mentioned this to my BPHC contract specialist as well - but how can I be sure all staff at [REDACTED] [REDACTED] are on the RWSD email blast. I'm concerned about what else we have missed/haven't done because we were not informed via this email communication strategy.

Improvements in the budget revision approval process would be helpful in order to manage funds more efficiently in a timely manner.

Give a complete packet to all recipients, stop with all the short notice required meeting that do not include copies of slides and/or information to be reviewed

We are very happy with the assistance provided by BPHC and its fiscal staff especially. Thank you!!

Answered: 4 Skipped: 16

# 2020 AAM RECOMMENDATIONS

## PROCUREMENT

- Clearer language on MAI and what it may fund, and guidance to currently funded MAI programs about the obligation to reapply during an open procurement
- A minimum of 6 weeks allotted for agencies to submit an RFP
- **SPEC to receive more information on the quality of the software used to submit RFP's online from BPHC**

## DISBURSEMENT OF FUNDS

- BPHC to offer a budget revision training to not only the agency's fiscal department but also staff overseeing the program
- Continue to offer budget revision training quarterly and record it for future reference
- Provide additional monitoring standards on how PO numbers are issued
- Provide SPEC with more information on how BPHC issues PO numbers for the committee to better target survey questions
- **For better transparency and collaboration, a newsletter to be sent to all funded agencies over the summer which summarizes highlights from the AAM and the recommendations created by SPEC. Alert the agencies to expect a summary of the AAM BPHC response in the fall and present the newest best practices that has come out the recommendations.**