

# San Antonio Area HIV/AIDS Health Services Planning Council

---

*2013 – 2014 Assessment of the Administrative  
Mechanism*

---

# Contents

- 1. Introduction ..... 3
  - 1.a. Project Purpose..... 3
  - 1.c Project Consultants..... 3
- 2. Scope of Work..... 4
- 3. Methodology ..... 4
  - 3.a Data Collection Processes ..... 4
    - 3.a.i. Documentation Review/Analysis ..... 4
    - 3.a.ii. Data Collection/Analysis..... 6
    - 3.a.iii. Limitations..... 6
    - 3.a.iv. Draft and Final Reports..... 7
- 4. Report Format ..... 7
  - 4.a. Priority Setting & Resource Allocation Process ..... 8
  - 4.b. Reallocations..... 10
  - 4.c. Notice of Award, Budgeting, and Contracts ..... 11
  - 4.d. Billing & Reimbursement..... 12
- 5. Conclusion..... 14

## 1. Introduction

### 1.a. Project Purpose

Ryan White Part A Planning Councils are tasked by law to “assess the efficiency of the administrative mechanism in rapidly allocating funds to the areas of greatest need within the eligible area, and at the discretion of the planning council, assess the effectiveness, either directly or through contractual arrangements, of the services offered in meeting the identified needs.” This year’s assessment focused solely on the rapid allocation and reallocation of funds; service efficacy is not addressed in the 2013-2014 Assessment. The Bexar County Department of Community Resources (DCR), serves as the Administrative Agency (AA) for administering the Ryan White Program. This includes, but is not limited to, oversight of grant funds, preparation of bid packages in accordance with the Planning Council priorities, and translates Planning Council recommendations into contracts with agencies. The Executive Committee of the Planning Council develops the timeline and Scope of Work for the Assessment of the Administration Mechanism for the San Antonio Transitional Grant Area (SATGA).

### 1.b. Project Goals

The goal of the 2013-2014 Assessment of the Administrative Mechanism is to target the following areas for review:

- Priority Setting and Resource Allocation
- Expenditure Reporting
- Fiscal Monitoring/Reimbursement

### 1.c Project Consultants

The Planning Council elected to conduct the 2013-2014 Assessment of the Administrative Mechanism through a Bexar County sole-source contractual arrangement with PROVADO, The Group, Inc. (Provado). It is important to note that Provado was awarded this same contract for the 2007-2008, 2008-2009, 2009-2010, 2010-2011, and 2012-2013 Assessments of the Administrative Mechanism in the SATGA. This history exhibits the familiarity of the contractor with the history and evolving quality improvement of the Administrative Mechanism.

## 2. Scope of Work

Initially, Provado interacted with the following entities to build buy-in and local understanding in the development of the proposed process for evaluation:

- Planning Council Executive Committee; and
- Administrative Agency (DCR).

During the assessment activity, Provado targeted the following in gathering data, administering surveys and convening focus groups/key informant interviews:

- Planning Council Members;
- Awarded Service Providers;
- Administrative Agency (DCR); and
- The Bexar County Auditor's Office.

Provado's intent was to analyze collected data, identify areas of successes, administrative improvements, and potential process improvements, and present a comprehensive report to the SATGA's Planning Council.

## 3. Methodology

### 3.a. Data Collection Processes

Provado utilized the following process to complete the stated scope of work, divided into three components:

- i. Documentation Review/Analysis
- ii. Data Collection/Analysis
- iii. Production of Draft and Final Reports

#### 3.a.i. Documentation Review/Analysis

The documentation review process scientifically mirrored a literature review. Similar to a literature review, Provado read, analyzed and critically reviewed a comprehensive array of key documents relevant to the administrative mechanism. The purpose of this detailed and in-depth review was to ensure the fullest comprehension and understanding of the administrative mechanism. The documents requested were recommended for review by the Sample Process and Form for Assessment of the Administrative Mechanism from the Ryan White CARE Act Title I Manual. Additional documentation was requested for deeper analysis, as appropriate. The documents requested represented seven (7) key areas:

1. Policies & Procedures;
2. Allocation/Reallocation;
3. Grant Award Documentation;

4. The Planning Council;
5. Service Provider Invoices;
6. Fiscal Site Visit Reports; and
7. Administrative Agency's Updated Documentation for Monthly Monitoring of Service Provider Expenditures.

The list of documents reviewed exhibits the comprehensiveness of the analysis:

- Policies & Procedures:
  - Monthly Agency Review Policy;
  - Process for Reallocation & Redistribution of Funds;
  - Timely Reimbursement of Subcontractors and Technical Assistance;
  - Policy for Communicating with Auditors; and
  - Planning Council Grievance Procedure Policy
- Allocations and Reallocations
  - 2013 – 2014 Expenditure Reports, Part A & MAI;
  - Planned Allocations Report;
  - Final Allocations Report;
  - Unallocated Funds Report; and
  - Follow-up Documentation for September & December 2013 Monthly Monitoring Agency Review meetings
- Grant Award Documentation
  - Part A Initial Notice of Award 2014;
  - Part A Revised Notice of Award 2014; and
  - Part A Carryover Notice of Award 2014
- Planning Council Documents
  - 2012 Comprehensive Needs Assessment;
  - 2012 – 2015 Comprehensive Plan;
  - 2013 – 2014 Assessment of the Administrative Mechanism; and
  - Planning Council By-Laws germane to allocations & reallocations
- Invoices:
  - All provider invoices, May 2013;
  - All provider invoices, December 2013; and
  - 2013 – 2014 Ryan White Invoice Tracking Sheet
- Fiscal Site Visit Reports
  - 2013 – 2014 Fiscal Audit Reports
- Administrative Agency Documentation:
  - Monthly Agency Review Checklist;
  - October 2013 Monthly Agency Review Minutes;

- October 2013 Monthly Agency Review Spreadsheets; and
- Provider Technical Assistance Request Log

### 3.a.ii. Data Collection/Analysis

The data collection process was accomplished via the Health Resources and Services Administration (HRSA) recommended collection methods. The primary data collection method involved the utilization of a survey tool, a Key Informant Interview (KI) and Focus Groups (FG).

The survey tool adhered to survey questions approved by the Executive Committee of the Planning Council. Two survey tools were constructed: one survey for service providers (7 respondents representing 4 agencies) and one survey for Planning Council members (18 respondents). Surveys were conducted and collected via Survey Monkey, an online survey collection and analysis platform. Survey Monkey's platform features organized, sorted, and analyzed data. *See Attachments A & B for the summary analysis of each survey implemented, and Attachments C-F for transcripts of the Key Informant/Focus Group interviews.*

Provado conducted KIs and FGs with participation/representation from all key stakeholders in this process. Representation included the AA staff, county Auditor's Office staff, and Planning Council Liaison.

The following table represents the total number of individual participants, their respected affiliations, and the methodology used to gather data.

	<i># Interviewed/Surveyed</i>	<i>KI / FG / Survey</i>
<i>Administrative Agency Staff, including Planning Council Liaison</i>	7	FG & KI
<i>Auditor's Office Staff</i>	2	FG
<i>Service Providers (4)</i>	7	Survey
<i>Planning Council Members</i>	18	Survey

### 3.a.iii. Limitations

There were some data limitations that prevented a fuller review of some procedures, but nothing, Provado feels, that would have revealed findings that are not present in the available data.

These limitations were in the Service Provider survey tool, which requested information from stakeholders that was less comprehensive than needed. For instance, one question asks, “When were you notified of your agency’s grant award?” with an open text box for responses. Answers ranged from January 2013 to June 2013, due to the fact that there were multiple notices of grant award during the fiscal year and respondents were not asked to differentiate between them. The array of responses made analyzing the success of the process challenging.

This was the only data limitation of note in the process, and a recommendation for an update to the survey tool is included in the analysis section.

### 3.a.iv. Draft and Final Reports

The first draft of the Assessment of the Administrative Mechanism Report was provided to Bexar County staff on Wednesday, June 25, 2014 for review. Edits were made to address minor changes and to clarify Findings and Recommendations, and a final copy of the report was submitted to Bexar County on Wednesday, July 16, 2014, and a final presentation to the Planning Council was given on Thursday, July 24, 2014.

## 4. Report Format

The 2013 – 2014 Assessment of the Administrative Mechanism for the SATGA is formatted by areas of focus pulled from the tools utilized for data collection: the approved survey tool and the approved KI and FG discussion scripts. Based on these tools, the report produced information on the *Priority Setting & Resource Allocation Process (PSRA; Reallocations & Redistributions; Notice of Award, Budgets, and Contracts; and Billing and Reimbursement*. The tools utilized in the collection of this data are included as Attachments A and B of this report for reference.

- a. PSRA Process: This grouping gathers all questions and responses regarding the annual PSRA process and focuses on the timeliness, quality, and comprehensiveness of data provided to the Planning Council and its committees for the benefit of PSRA activities.
- b. Reallocations: This grouping again gathers all questions and responses regarding reallocations, and focuses on the frequency, efficiency, and expediency of the reallocation process from various points of view.
- c. Notice of Award, Budgeting, and Contracts: This grouping not only gathers questions and responses in regard to funding notification and contracts, but also includes information on the documentation review of processes for these activities, and whether the responses to questions indicate adherence to policy

and procedures, as well as the efficiency and expediency of the contracting process.

- d. Billing and Reimbursement: This grouping reviews responses from providers, auditors, and AA staff, and focuses on the processes, efficiency, and expediency of the billing and reimbursement process. Documentation that tracks bills from receipt by the AA to disbursement by the County was also reviewed and compared to information provided in surveys and KIs.

Each section of the report, detailed above, presents *Findings* or *Observations* from the data analysis, and provides supportive data for each. Findings outline areas for administrative and/or process improvements, and Observations are utilized to address issues that fall outside the Process and Form for Assessment of the Administrative Mechanism guidelines, but are pertinent to the continued efficiency of the Administrative Mechanism. The Findings, and/or Observations involve the use of quotations and/or excerpts from data collection methodology. Finally, *Recommendations* to address areas for improvement in regard to Findings are presented.

#### 4.a. Priority Setting & Resource Allocation Process

PSRA activities are those activities pertaining to the annual PSRA process performed by the Planning Council to establish priorities for the coming year and to allocate funds to the areas of greatest need based on those priorities. The information regarding the 2013 PSRA process comes from three sources: Administrative Agency KI and FGs; , and responses to the Service Provider and Planning Council online surveys.

Review of KI/FG and survey responses from stakeholders indicate an efficient, expedient, and data-driven process for the annual PSRA process. High marks were given in the Planning Council survey for the quality, consistency and reliability of the data provided to the Planning Council for deliberations.

- Question: “During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?”

Answer Options	Response Percent	Response Count
Yes	70.6%	12
No	0.0%	0
I'm not sure	11.8%	2
I did not participate in the process	11.8%	2



I was not a member at that time	5.9%	1
<b>answered question</b>		<b>17</b>
<b>skipped question</b>		<b>1</b>

- Question: *“Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?”*

Answer Options	Response Percent	Response Count
Yes	70.6%	12
No	0.0%	0
I'm not sure	23.5%	4
I was not a member at that time	5.9%	1
<b>answered question</b>		<b>17</b>
<b>skipped question</b>		<b>1</b>

- Question: *“Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?”*

Answer Options	Response Percent	Response Count
Yes	76.5%	13
Somewhat	11.8%	2
No	0.0%	0
I am not sure	5.9%	1
I was not a member at that time	5.9%	1
<b>answered question</b>		<b>17</b>
<b>skipped question</b>		<b>1</b>

When asked for views on the PSRA process, comments from one FG for AA staff mirrored those of the survey respondents, noting that the process has been in place for several years now, and is very streamlined and efficient.

**Findings:** None.

**Recommendations:** Provado’s only recommendation for the PSRA process comes from the AA FG, where staff recommended that the PSRA process might be better served by occurring over two days, not necessarily consecutively. At the first meeting, stakeholders would be given data and presentations and time to study and absorb the information. At the second meeting, stakeholders would vote on service category priorities and make funding allocations. Provado agrees that this process might benefit the SATGA if it is considered.

## 4.b. Reallocations

Provado defines the Planning Council activities and the AA activities in regard to moving funding during the grant year separately, as follows:

Responses to Provider Survey questions regarding the monthly monitoring agency review (redistribution) indicated mixed support for the current process:

- Question: *“Does the AA have a simple process to request a reallocation of funds?”*

Answer Options	Response Percent	Response Count
Yes, very simple	0.0%	0
Yes, somewhat simple	33.3%	2
No, somewhat difficult	33.3%	2
No, very difficult	0.0%	0
I am not sure	16.7%	1
N/A	16.7%	1
<b>answered question</b>		<b>6</b>
<b>skipped question</b>		<b>1</b>

- Question: *“Do you believe the process for reallocating funds ensures an efficient process?”*

Answer Options	Response Percent	Response Count
Yes, I agree	33.3%	2
Yes, I somewhat agree	0.0%	0
No, I do not think the process is efficient	33.3%	2
I am not sure	16.7%	1
N/A	16.7%	1
<b>answered question</b>		<b>6</b>
<b>skipped question</b>		<b>1</b>

Provado notes there is a perception among service providers that the process for reallocating funding is not “simple”, and some do not feel the process is efficient. However, when offered the opportunity to provide context to these responses in the open text portion of the survey, providers were non-responsive to the reallocation processes in question, providing no specifics for what exactly is difficult regarding the process.

**Finding:** None

**Recommendation:** Provado recommends the AA meet with service providers to review the Provider Survey, particularly in regard to reallocations, and work with

service providers to understand why the process challenges them. Use the opportunity to cultivate new ideas and strategies that could help diminish misunderstanding and continue to promote proactive reallocation activities.

#### 4.c. Notice of Award, Budgeting, and Contracts

In order to facilitate the rapid distribution of funds, the process from Notice of Grant Award (NGA) to the execution of service provider contracts, and the timeliness of this process, is reviewed via FG, KI and survey. Service providers responded to the survey as follows:

- Question: “When were you notified of your agency’s grant award?”

Answer Options	Response Count
<i>answered question</i>	6
<i>skipped question</i>	1
Number	Response Text
1	06/09/2014
2	02/14/2014
3	N/A
4	01/13/2014
5	I don't remember, but it was as soon as AA got the announcement.
6	March 203 (2013)

The document review shows that the AA received a NGA in February 2013, June 2013, and December 2013. The February NGA was the SATGA’s original partial award, followed by the remainder of the 2014 award in June. The December 2013 NGA was the award of carryover funding from the prior grant year.

Improving from past years, only one service provider felt that the amount of time given for budget preparation after a notice of award was inadequate.

- Question: “Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?”

Answer Options	Response Percent	Response Count
Yes	50.0%	3
No	16.7%	1
I am not sure	16.7%	1
N/A -	16.7%	1
<i>answered question</i>		6
<i>skipped question</i>		1

Given the responses to this question by providers and the documentation review, it is demonstrated that no delay in notification of award occurred.

- Question: "Once you submitted your budget, generally how long has it taken to finalize your agency's contract?"

Answer Options	Response Percent	Response Count
Less than a month	16.7%	1
Two months	33.3%	2
Three months	16.7%	1
Four months	0.0%	0
More than four months	0.0%	0
I am not sure	16.7%	1
N/A	16.7%	1
<i>answered question</i>		<b>6</b>
<i>skipped question</i>		<b>1</b>

Provado notes that this survey question does not differentiate between delays caused by the service provider, such as internal vetting and review of contracts, and delays from the AA that may have occurred.

**Findings:** None.

**Recommendations:** Provado recommends in the 2014-2015 Provider Survey Tool that the questions regarding notice of award be divided into relevant award events to match NGA's received by the SATGA, such as Initial, Secondary/Final, and Carryover. This will allow providers to respond to each event to demonstrate for the next Assessment whether each notification was timely.

Further, the survey question regarding the timeframe for contract execution should be modified to demonstrate the amount of time the contract spends with the AA, and the amount of time it spends with the service provider.

#### 4.d. Billing & Reimbursement

Billing and Reimbursement covers those activities from the time a subcontractor submits a reimbursement (billing) request to the time funds are distributed by the county to the provider.

Service providers responding to the survey indicated that overall, the billing process is somewhat slow, and that there is not always follow-up when questions arise. For instance:

- *“When payments do not match the submitted invoice, explanations are not provided. The agency's fiscal staff must call Bexar County for an explanation. In addition, I strongly believe that the 30 day period in the auditor's office before reimbursement should be reviewed as a contractual policy. There are only 4 RW providers who must spend increasing budgets. This process is impeded when reimbursements are unnecessarily slow> the auditor's office will sometimes sit on invoices until 30 days have elapsed, unless prompted otherwise from Bexar County Administrators.”*

Provado found no indication in its documentation review that the AA fails to provide explanations for reimbursement amounts that differ from the requested amount. An easy to understand document is given to providers that clearly displays the amount requested, and amount reimbursed, and contains notes that explain any variation in the requested and reimbursed amounts.

Provado extensively reviewed the amount of time that it takes for service providers to receive reimbursement. Provado has reviewed sample Ryan White contracts for Part A and notes that the maximum allowable time for handling an invoice at the AA is 21 business days. Further, the Auditor's Office maximum allowable time for handling an invoice is 30 business days. At the maximum allowable time, a service provider could wait up to 51 business days (72 calendar days), which is 10 weeks. For the 2013 – 2014 Part A invoices processed for providers, the average time for reimbursement was 39 days, with outliers of 9 days (2 invoices) and 79 days (1 invoice), so it is evident that the AA and the Auditor's Office rarely, if ever, take advantage of this timeframe.

**Findings:** None.

**Recommendations:** The AA and the Auditor's Office should always be open to continuous quality improvement strategies that could decrease the amount of time from submission of invoices to receipt of payment for subcontractors. Keeping this turnaround time at a minimum supports an agency's liquidity, ensuring their ability to meet the needs of PLWH/A in the SATGA.

However, there is no evidence in the documentation provided that there is any systemic excess of turnaround time for subcontractor reimbursement.

To be thorough, Provado reviewed the *Bexar County DCR Ryan White Program - Timely Reimbursement of Subcontractors, Technical Assistance* policy, which states that the AA has one (1) week to review service provider invoices before submitting them to the Auditor's Office. Provado recommends reviewing this policy and

changing the language to more accurately reflect the current contractual verbiage, which provides 21 days for turnaround from receipt to submission to the Auditor's Office.

## 5. Conclusion

Provado would like to congratulate the Bexar County Department of Community Resources for having no findings for the 2013-2014 Assessment of the Administration Mechanism.

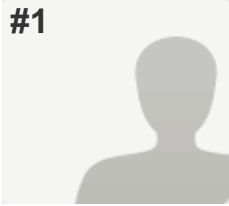
Overall, Provado finds that the Bexar County DCR, Planning Council, Auditor's Office and the service providers have done a commendable job overseeing the Ryan White Part A Administrative Mechanism. The numerous process improvements, particularly those that spoke to the findings in the 2012-2013 AAM, appear to be working and are effective.

Provado commends Bexar County on the tremendous cohesion and commitment to PLWH/A shown at all levels, and for their dedication to continuous quality improvement of practices and procedures. The County's responsiveness, particularly the DCR's, to recommendations is a testament to their desire to meet and exceed grant compliance.

# Attachment A

---

## Planning Council Survey Responses

**#1**  **COMPLETE**  
**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 8:57:57 AM  
**Last Modified:** Wednesday, June 11, 2014 9:00:44 AM  
**Time Spent:** 00:02:47  
**IP Address:** 209.189.238.190

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	0-6 months
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	Fewer than 5 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	I was not a member at that time
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	I'm not sure
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations



<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	I am not sure
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I somewhat agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I somewhat agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	I'm not sure
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	I'm not sure
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Somewhat
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Somewhat
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#2



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 9:07:23 AM  
**Last Modified:** Wednesday, June 11, 2014 9:09:21 AM  
**Time Spent:** 00:01:58  
**IP Address:** 167.137.1.14

PAGE 1

**Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?** More than 2 years

**Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?** Fewer than 5 meetings

PAGE 2: Priority Setting & Resource Allocation Process

**Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?** Yes

**Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?** Yes

**Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?** Yes

**Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?** Yes

**Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?** Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#3



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 9:57:18 AM  
**Last Modified:** Wednesday, June 11, 2014 10:09:11 AM  
**Time Spent:** 00:11:53  
**IP Address:** 129.111.52.121

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 6 months – 1 year
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

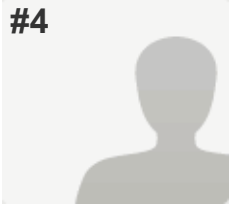
<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	I'm not sure
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

**#4**  **COMPLETE**  
**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 2:30:00 PM  
**Last Modified:** Wednesday, June 11, 2014 2:35:57 PM  
**Time Spent:** 00:05:57  
**IP Address:** 173.174.148.125

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	All 10 meetings

PAGE 2: Priority Setting & Resource Allocation Process

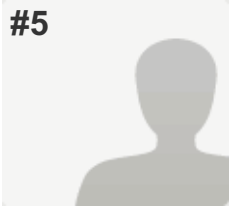
<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	No
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	I did not participate in the process
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	I'm not sure
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Somewhat
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	No
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	No
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Somewhat
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

<b>#5</b>		<p><b>COMPLETE</b></p> <p><b>Collector:</b> Web Link (Web Link)  <b>Started:</b> Friday, June 13, 2014 7:47:25 AM  <b>Last Modified:</b> Friday, June 13, 2014 7:50:39 AM  <b>Time Spent:</b> 00:03:14  <b>IP Address:</b> 167.137.1.14</p>
-----------	---	---

PAGE 1

<p><b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b></p>	<p>More than 6 months – 1 year</p>
<p><b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b></p>	<p>5-9 meetings</p>

PAGE 2: Priority Setting & Resource Allocation Process

<p><b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b></p>	<p>Yes</p>
<p><b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b></p>	<p>Yes</p>
<p><b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b></p>	<p>Yes</p>
<p><b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b></p>	<p>Yes</p>
<p><b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b></p>	<p>Somewhat</p>

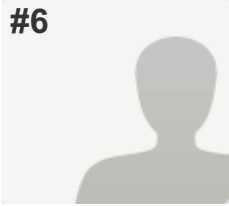
PAGE 3: Reallocations



<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	I'm not sure
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	I'm not sure
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

<b>#6</b>		<p><b>COMPLETE</b></p> <p><b>Collector:</b> Web Link (Web Link)  <b>Started:</b> Sunday, June 15, 2014 11:52:18 AM  <b>Last Modified:</b> Sunday, June 15, 2014 11:55:00 AM  <b>Time Spent:</b> 00:02:42  <b>IP Address:</b> 70.125.145.128</p>
-----------	---	---

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	All 10 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#7



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Monday, June 16, 2014 5:54:55 AM  
**Last Modified:** Monday, June 16, 2014 5:57:21 AM  
**Time Spent:** 00:02:26  
**IP Address:** 67.79.232.42

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	All 10 meetings

PAGE 2: Priority Setting & Resource Allocation Process

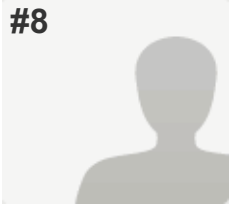
<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Somewhat
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I somewhat agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

<b>#8</b>		<p><b>COMPLETE</b></p> <p><b>Collector:</b> Web Link (Web Link)  <b>Started:</b> Tuesday, June 17, 2014 8:09:35 AM  <b>Last Modified:</b> Tuesday, June 17, 2014 8:12:55 AM  <b>Time Spent:</b> 00:03:20  <b>IP Address:</b> 12.91.193.250</p>
-----------	---	--

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 6 months – 1 year
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

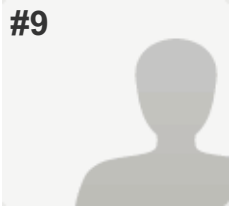
<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

**#9**  **COMPLETE**  
**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 8:26:34 AM  
**Last Modified:** Tuesday, June 17, 2014 8:30:12 AM  
**Time Spent:** 00:03:38  
**IP Address:** 50.84.88.230

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 6 months – 1 year
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	No
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	I'm not sure
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	I'm not sure
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations



<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Somewhat
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I somewhat agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I somewhat agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Somewhat
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Somewhat
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#10



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 10:11:21 AM  
**Last Modified:** Tuesday, June 17, 2014 10:48:16 AM  
**Time Spent:** 00:36:55  
**IP Address:** 12.71.182.66

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	0-6 months
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	Fewer than 5 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	I was not a member at that time
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	I was not a member at that time
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	I was not a member at that time
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	I was not a member at that time

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	I was not a member at that time
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	I was not a member at that time
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	I was not a member at that time
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Somewhat
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Somewhat
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#11



**INCOMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 12:29:55 PM  
**Last Modified:** Tuesday, June 17, 2014 12:31:18 PM  
**Time Spent:** 00:01:23  
**IP Address:** 173.174.139.81

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	<i>Respondent skipped this question</i>
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	<i>Respondent skipped this question</i>
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	<i>Respondent skipped this question</i>
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	<i>Respondent skipped this question</i>
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	<i>Respondent skipped this question</i>

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	<i>Respondent skipped this question</i>
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	<i>Respondent skipped this question</i>
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	<i>Respondent skipped this question</i>
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	<i>Respondent skipped this question</i>
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	<i>Respondent skipped this question</i>
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	<i>Respondent skipped this question</i>
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

**PAGE 4: Expenditure Reports**

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	<i>Respondent skipped this question</i>
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	<i>Respondent skipped this question</i>
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	<i>Respondent skipped this question</i>
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	<i>Respondent skipped this question</i>
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	<i>Respondent skipped this question</i>
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#12



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 5:28:53 PM  
**Last Modified:** Tuesday, June 17, 2014 5:32:45 PM  
**Time Spent:** 00:03:52  
**IP Address:** 70.125.157.91

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	All 10 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Somewhat

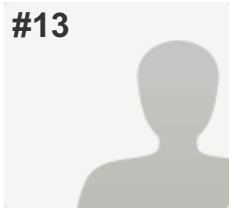
PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I somewhat agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I somewhat agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#13



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Thursday, June 19, 2014 6:38:00 AM  
**Last Modified:** Thursday, June 19, 2014 6:51:57 AM  
**Time Spent:** 00:13:57  
**IP Address:** 173.174.139.81

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	I'm not sure
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	No
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	I did not participate in the process
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	I am not sure

PAGE 3: Reallocations



<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	I am not sure
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I somewhat agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	No
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	No
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#14



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Thursday, June 19, 2014 12:16:28 PM  
**Last Modified:** Thursday, June 19, 2014 12:20:03 PM  
**Time Spent:** 00:03:35  
**IP Address:** 24.173.106.146

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 6 months – 1 year
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	I'm not sure
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	I'm not sure
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

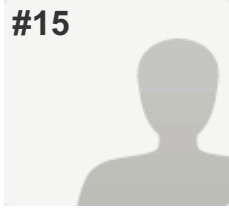
PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	I am not sure
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	N/A, I am not sure
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	N/A, I am not sure
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	I'm not sure
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

## PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#15



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Thursday, June 19, 2014 2:54:51 PM  
**Last Modified:** Thursday, June 19, 2014 2:56:33 PM  
**Time Spent:** 00:01:42  
**IP Address:** 208.83.182.6

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	All 10 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#16



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Friday, June 20, 2014 7:15:09 AM  
**Last Modified:** Friday, June 20, 2014 7:17:19 AM  
**Time Spent:** 00:02:10  
**IP Address:** 99.104.92.225

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 1 year – 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	I'm not sure
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	I'm not sure
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	I'm not sure
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	I'm not sure
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#17



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Friday, June 20, 2014 6:57:38 AM  
**Last Modified:** Friday, June 20, 2014 10:22:52 AM  
**Time Spent:** 03:25:14  
**IP Address:** 152.131.9.132

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations



<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 4: Expenditure Reports

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#18



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Friday, June 20, 2014 2:42:59 PM  
**Last Modified:** Friday, June 20, 2014 2:55:42 PM  
**Time Spent:** 00:12:43  
**IP Address:** 23.116.223.217

PAGE 1

<b>Q1: For the period of March 1, 2013 to February 28, 2014, how long had you served on the Planning Council?</b>	More than 2 years
<b>Q2: Between March 1, 2013 and February 28, 2014, did you attend Planning Council meetings on a regular basis?</b>	5-9 meetings

PAGE 2: Priority Setting & Resource Allocation Process

<b>Q3: During the grant year, were you provided with a copy or were you made aware of the Needs Assessment's availability on the Planning Council's website, or an explanation of the Needs Assessment conducted to help determine which needs of the community were being met and which ones were not?</b>	Yes
<b>Q4: Were you invited to participate in the Priority Setting and REsource Allocations process in July and August, 2013?</b>	Yes
<b>Q5: During the Priority Setting and Resource Allocations process, were you provided with understandable information/data regarding the needs and service utilization in the Ryan White community?</b>	Yes
<b>Q6: Did the AA provide expenditure spreadsheets regarding the utilization of funds and explanations on why funds were delayed, if applicable?</b>	Yes
<b>Q7: Did the awarding of funds in specific categories match the percentage allocations established by the Planning Council prior to any allocations being made?</b>	Yes

PAGE 3: Reallocations

<b>Q8: When the Planning Council was involved in the reallocation process, were explanations provided on why the allocations were being requested, e.g. memos, presentations, etc.?</b>	Yes
<b>Q9: When the AA reallocated funds within its 10% discretion, was the Planning Council made aware that the reallocations were made?</b>	Yes
<b>Q10: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?</b>	Yes, I agree
<b>Q11: Do you believe the process for reallocation funds, i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?</b>	Yes, I agree
<b>Q12: Were you notified of any carryover requests made in FY 2013-2014 for unspent funds from FY 2012-2013?</b>	Yes
<b>Q13: If carryover funds from FY 2012 - 2013 needed to be allocated, were you invited to participate in the discussion and approval of the carryover amount?</b>	Yes
<b>Q14: Please add any additional comments regarding this series of questions.</b>	
I am very proud of the work that both the AA and PC have accomplished over the years but particularly when the funds from the government were not on time and we had to work with what we had. It showed great care, wisdom, and passion for what we are commissioned to do as well as professionalism. Kudos to the AA and PC!!!!	

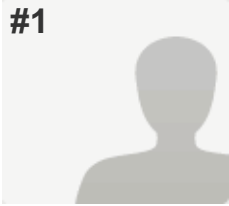
**PAGE 4: Expenditure Reports**

<b>Q15: Are updated expenditure reports provided to the Planning Council on a regular basis?</b>	Yes
<b>Q16: Does the AA provide expenditure reports in a format that is easily understood by the Planning Council?</b>	Yes
<b>Q17: Do you believe the information provided in the expenditure reports is accurate and reliable?</b>	Yes
<b>Q18: When other financial information is needed from the AA, is the information provided in a timely manner?</b>	Yes
<b>Q19: When other financial information is needed from the AA, is the information presented in an understandable format?</b>	Yes
<b>Q20: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

# Attachment B

---


## Provider Survey Responses

**#1**  **COMPLETE**  
**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 10:48:32 AM  
**Last Modified:** Wednesday, June 11, 2014 11:02:05 AM  
**Time Spent:** 00:13:33  
**IP Address:** 67.79.232.42

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Executive
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	I don't remember, but it was as soon as AA got the announcement.
	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	Yes
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	Two months
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	Yes
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	N/A
<b>Q9: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	Yes
--	-----

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q11: As a provider, have you ever applied for reallocated funds?</b>	Yes
<b>Q12: Does the AA have a simple process to request a reallocation of funds?</b>	Yes, somewhat simple
<b>Q13: Do you believe the process for reallocating funds ensures an efficient process?</b>	Yes, I agree
<b>Q14: Do you believe the process for reallocating funds ensures an expedient process?</b>	Yes, I agree
<b>Q15: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 4: Fiscal Audit

<b>Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?</b>	Yes
<b>Q17: If so, was an Entrance Conference conducted?</b>	Yes
<b>Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?</b>	Yes
<b>Q19: Did your agency receive a written report of the fiscal auditing visit?</b>	Yes
<b>Q20: Was your agency allowed at least 30 days to respond to the report and its finding?</b>	N/A
<b>Q21: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 5: Billing & Reimbursement

<b>Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?</b>	Yes
<b>Q23: Is your agency reimbursed for accurate billings in a timely manner?</b>	Yes
<b>Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?</b>	31-45 Business Days

2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?</b>	Yes
<b>Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?</b>	Less than 5 business days
<b>Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?</b>	Yes - please skip to question 29
<b>Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?</b>	N/A
<b>Q29: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

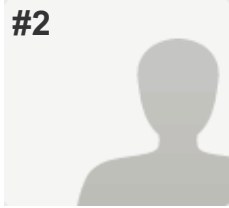
PAGE 6: Technical Assistance

<b>Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?</b>	Yes
--	-----

PAGE 7

<b>Q31: If so, what technical assistance did you request?</b> Showing new timesheets to be submitted.	
<b>Q32: Did the AA comply with your request for technical assistance?</b>	Yes
<b>Q33: Did the technical assistance meet your agency's needs?</b>	Yes
<b>Q34: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#2



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 6:18:48 AM  
**Last Modified:** Tuesday, June 17, 2014 6:28:25 AM  
**Time Spent:** 00:09:37  
**IP Address:** 67.79.232.42

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Fiscal Staff
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 2 – 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	01/13
<input type="text" value="01/13"/>	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	Yes
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	Three months
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	Yes
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	No
<b>Q9: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	Yes
--	-----



## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q11: As a provider, have you ever applied for reallocated funds?</b>	Yes
<b>Q12: Does the AA have a simple process to request a reallocation of funds?</b>	Yes, somewhat simple
<b>Q13: Do you believe the process for reallocating funds ensures an efficient process?</b>	Yes, I agree
<b>Q14: Do you believe the process for reallocating funds ensures an expedient process?</b>	Yes, I agree
<b>Q15: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 4: Fiscal Audit

<b>Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?</b>	I am not sure - check N/A for questions 17 - 20
<b>Q17: If so, was an Entrance Conference conducted?</b>	N/A
<b>Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?</b>	N/A
<b>Q19: Did your agency receive a written report of the fiscal auditing visit?</b>	N/A
<b>Q20: Was your agency allowed at least 30 days to respond to the report and its finding?</b>	N/A
<b>Q21: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 5: Billing & Reimbursement

<b>Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?</b>	Yes
<b>Q23: Is your agency reimbursed for accurate billings in a timely manner?</b>	Yes
<b>Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?</b>	31-45 Business Days

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?</b>	Yes
<b>Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?</b>	I am not sure
<b>Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?</b>	Yes - please skip to question 29
<b>Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?</b>	N/A
<b>Q29: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

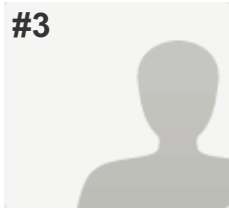
### PAGE 6: Technical Assistance

<b>Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?</b>	No - proceed to the next page
--	-------------------------------

### PAGE 7

<b>Q31: If so, what technical assistance did you request?</b>	<i>Respondent skipped this question</i>
<b>Q32: Did the AA comply with your request for technical assistance?</b>	<i>Respondent skipped this question</i>
<b>Q33: Did the technical assistance meet your agency's needs?</b>	<i>Respondent skipped this question</i>
<b>Q34: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

#3



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 6:38:16 AM  
**Last Modified:** Tuesday, June 17, 2014 6:46:24 AM  
**Time Spent:** 00:08:08  
**IP Address:** 67.79.232.42

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Executive
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	N/A
<input type="text"/>	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	N/A -
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	N/A
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	N/A
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	N/A
<b>Q9: Please add any additional comments regarding this series of questions.</b>	
I oversee programs and evaluation, but am not involved in contracts, budgets and billings	

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	I am not sure
--	---------------

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q11: As a provider, have you ever applied for reallocated funds?** Yes

**Q12: Does the AA have a simple process to request a reallocation of funds?** N/A

**Q13: Do you believe the process for reallocating funds ensures an efficient process?** N/A

**Q14: Do you believe the process for reallocating funds ensures an expedient process?** N/A

**Q15: Please add any additional comments regarding this series of questions.**

There is not a clear process to request that unspent funds for the TGA, that were not your own award, be requested for either capacity building or for other RW categories that need additional funds

### PAGE 4: Fiscal Audit

**Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?** N/A - check N/A for questions 17 - 20

**Q17: If so, was an Entrance Conference conducted?** N/A

**Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?** N/A

**Q19: Did your agency receive a written report of the fiscal auditing visit?** N/A

**Q20: Was your agency allowed at least 30 days to respond to the report and its finding?** N/A

**Q21: Please add any additional comments regarding this series of questions.** *Respondent skipped this question*

### PAGE 5: Billing & Reimbursement

**Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?** N/A

**Q23: Is your agency reimbursed for accurate billings in a timely manner?** N/A

**Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?** N/A

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?** N/A - check N/A for questions 26 - 28

**Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?** N/A

**Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?** N/A - please skip to question 29

**Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?** N/A

**Q29: Please add any additional comments regarding this series of questions.** *Respondent skipped this question*

### PAGE 6: Technical Assistance

**Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?** N/A - proceed to the next page

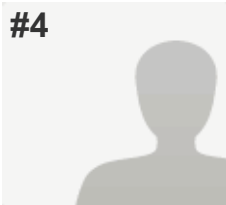
### PAGE 7

**Q31: If so, what technical assistance did you request?** *Respondent skipped this question*

**Q32: Did the AA comply with your request for technical assistance?** *Respondent skipped this question*

**Q33: Did the technical assistance meet your agency's needs?** *Respondent skipped this question*

**Q34: Please add any additional comments regarding this series of questions.** *Respondent skipped this question*



#4

**INCOMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 6:53:30 AM  
**Last Modified:** Tuesday, June 17, 2014 6:54:04 AM  
**Time Spent:** 00:00:34  
**IP Address:** 50.84.88.230

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Program Director
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 6 months – 1 year

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	<i>Respondent skipped this question</i>
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	<i>Respondent skipped this question</i>
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	<i>Respondent skipped this question</i>
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	<i>Respondent skipped this question</i>
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	<i>Respondent skipped this question</i>
<b>Q9: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	<i>Respondent skipped this question</i>
--	---

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q11: As a provider, have you ever applied for reallocated funds?**

*Respondent skipped this question*

**Q12: Does the AA have a simple process to request a reallocation of funds?**

*Respondent skipped this question*

**Q13: Do you believe the process for reallocating funds ensures an efficient process?**

*Respondent skipped this question*

**Q14: Do you believe the process for reallocating funds ensures an expedient process?**

*Respondent skipped this question*

**Q15: Please add any additional comments regarding this series of questions.**

*Respondent skipped this question*

### PAGE 4: Fiscal Audit

**Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?**

*Respondent skipped this question*

**Q17: If so, was an Entrance Conference conducted?**

*Respondent skipped this question*

**Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?**

*Respondent skipped this question*

**Q19: Did your agency receive a written report of the fiscal auditing visit?**

*Respondent skipped this question*

**Q20: Was your agency allowed at least 30 days to respond to the report and its finding?**

*Respondent skipped this question*

**Q21: Please add any additional comments regarding this series of questions.**

*Respondent skipped this question*

### PAGE 5: Billing & Reimbursement

**Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?**

*Respondent skipped this question*

**Q23: Is your agency reimbursed for accurate billings in a timely manner?**

*Respondent skipped this question*

**Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?**

*Respondent skipped this question*

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?**

*Respondent skipped this question*

**Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?**

*Respondent skipped this question*

**Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?**

*Respondent skipped this question*

**Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?**

*Respondent skipped this question*

**Q29: Please add any additional comments regarding this series of questions.**

*Respondent skipped this question*

### PAGE 6: Technical Assistance

**Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?**

*Respondent skipped this question*

### PAGE 7

**Q31: If so, what technical assistance did you request?**

*Respondent skipped this question*

**Q32: Did the AA comply with your request for technical assistance?**

*Respondent skipped this question*

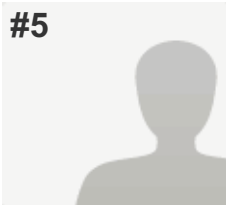
**Q33: Did the technical assistance meet your agency's needs?**

*Respondent skipped this question*

**Q34: Please add any additional comments regarding this series of questions.**

*Respondent skipped this question*





**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 9:22:23 AM  
**Last Modified:** Tuesday, June 17, 2014 9:40:44 AM  
**Time Spent:** 00:18:21  
**IP Address:** 198.190.245.10

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Program Staff
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	02/14/2014
<input type="text" value="02/14/2014"/>	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	No
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	Less than a month
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	Yes
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	No
<b>Q9: Please add any additional comments regarding this series of questions.</b> Bexar County requires contract responses in weeks, this process due large bureacratic entity requires a lengthier time period. Bexar County usually takes more than 30 days to get signed contract.	

PAGE 3: Expenditure Tracking & Reallocations

2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	Yes
<b>Q11: As a provider, have you ever applied for reallocated funds?</b>	Yes
<b>Q12: Does the AA have a simple process to request a reallocation of funds?</b>	No, somewhat difficult
<b>Q13: Do you believe the process for reallocating funds ensures an efficient process?</b>	No, I do not think the process is efficient
<b>Q14: Do you believe the process for reallocating funds ensures an expedient process?</b>	No, I do not think the process is expedient
<b>Q15: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 4: Fiscal Audit

<b>Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?</b>	Yes
<b>Q17: If so, was an Entrance Conference conducted?</b>	Yes
<b>Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?</b>	Yes
<b>Q19: Did your agency receive a written report of the fiscal auditing visit?</b>	No
<b>Q20: Was your agency allowed at least 30 days to respond to the report and its finding?</b>	N/A
<b>Q21: Please add any additional comments regarding this series of questions.</b>	
This process has been taken almost a year to complete.	

PAGE 5: Billing & Reimbursement

<b>Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?</b>	Yes
<b>Q23: Is your agency reimbursed for accurate billings in a timely manner?</b>	No

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?**

31-45 Business Days

**Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?**

Yes

**Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?**

Less than 5 business days

**Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?**

Yes - please skip to question 29

**Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?**

Yes

**Q29: Please add any additional comments regarding this series of questions.**

ARIES pulls POI based on the most current entry in ARIES by any entity. This creates issues of disallowed payments, but according to the agency record the client is eligible.

### PAGE 6: Technical Assistance

**Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?**

Yes

### PAGE 7

**Q31: If so, what technical assistance did you request?**

Timesheet preparation and Program Income.  
ARIES issues

**Q32: Did the AA comply with your request for technical assistance?**

Yes

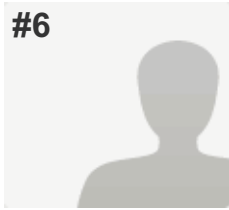
**Q33: Did the technical assistance meet your agency's needs?**

No

**Q34: Please add any additional comments regarding this series of questions.**

Continue to need clarification to best meet the grant requirements. DSHS is not very responsive to the contract needs regarding issues related to ARIES. ARIES being updated during major reporting deadlines are needed and no technical supports. DSHS limits assistance if and when DSHS staff are out of the office.

#6



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Tuesday, June 17, 2014 1:29:56 PM  
**Last Modified:** Tuesday, June 17, 2014 1:43:23 PM  
**Time Spent:** 00:13:27  
**IP Address:** 64.32.206.4

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Executive
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	June 9, 2014
<input type="text" value=""/>	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	Yes
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	Two months
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	Yes
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	Not Applicable (process did not take more than 4 months)
<b>Q9: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	Yes
--	-----

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q11: As a provider, have you ever applied for reallocated funds?</b>	Yes
<b>Q12: Does the AA have a simple process to request a reallocation of funds?</b>	No, somewhat difficult
<b>Q13: Do you believe the process for reallocating funds ensures an efficient process?</b>	No, I do not think the process is efficient
<b>Q14: Do you believe the process for reallocating funds ensures an expedient process?</b>	No, I do not think the process is expedient

**Q15: Please add any additional comments regarding this series of questions.**

I think that the main impediment to the reallocation process is approval from the Planning Council, which is an entity that is past its era of usefulness.

### PAGE 4: Fiscal Audit

<b>Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?</b>	Yes
<b>Q17: If so, was an Entrance Conference conducted?</b>	Yes
<b>Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?</b>	Yes
<b>Q19: Did your agency receive a written report of the fiscal auditing visit?</b>	Yes
<b>Q20: Was your agency allowed at least 30 days to respond to the report and its finding?</b>	Yes
<b>Q21: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 5: Billing & Reimbursement

<b>Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?</b>	Yes
<b>Q23: Is your agency reimbursed for accurate billings in a timely manner?</b>	No
<b>Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?</b>	31-45 Business Days

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?** Yes

**Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?** 11-15 business days

**Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?** No

**Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?** No

**Q29: Please add any additional comments regarding this series of questions.**

When payments do not match the submitted invoice, explanations are not provided. The agency's fiscal staff must call Bexar County for an explanation. In addition, I strongly believe that the 30 day period in the auditor's office before reimbursement should be reviewed as a contractual policy. There are only 4 RW providers who must spend increasing budgets. This process is impeded when reimbursements are unnecessarily slow> the auditor's office will sometimes sit on invoices until 30 days have elapsed, unless prompted otherwise from Bexar County Administrators.

### PAGE 6: Technical Assistance

**Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?** No - proceed to the next page

### PAGE 7

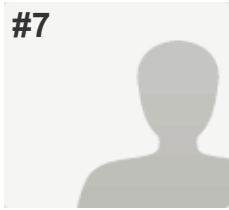
**Q31: If so, what technical assistance did you request?** *Respondent skipped this question*

**Q32: Did the AA comply with your request for technical assistance?** *Respondent skipped this question*

**Q33: Did the technical assistance meet your agency's needs?** *Respondent skipped this question*

**Q34: Please add any additional comments regarding this series of questions.** *Respondent skipped this question*

#7



**COMPLETE**

**Collector:** Web Link (Web Link)  
**Started:** Wednesday, June 11, 2014 9:20:08 AM  
**Last Modified:** Friday, June 20, 2014 1:42:23 PM  
**Time Spent:** Over a week  
**IP Address:** 50.84.88.230

PAGE 1: 2013 - 2014 Assessment of the Administrative Mechanism

<b>Q1: With which Ryan White Provider Organization are you affiliated?</b>	Redacted
<b>Q2: Which of the following best describes your involvement in the delivery of services at your organization?</b>	Fiscal Staff
<b>Q3: As of February 28, 2014, how long have you been a staff member for the organization at which you are employed?</b>	More than 2 – 5 years

PAGE 2: Contracts, Budgets, Award Process

<b>Q4: When were you notified by the AA of your agency's grant award? Please enter the date.</b>	March, 203
<input type="text" value="March, 203"/>	
<b>Q5: Was adequate time allotted for your agency to prepare the required budget after the initial contract was awarded?</b>	I am not sure
<b>Q6: Once you submitted your budget, generally how long has it taken to finalize your agency's contract?</b>	I am not sure
<b>Q7: Does your agency have an internal review and approval process for contracts?</b>	Yes
<b>Q8: If your contract took more than four months to be finalized, was this due to your agency's process for handling of contracts?</b>	Not Applicable (process did not take more than 4 months)
<b>Q9: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

PAGE 3: Expenditure Tracking & Reallocations

<b>Q10: Did the AA communicate with your agency during the grant year to ensure that funding was being spent in a timely manner?</b>	Yes
--	-----

## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

<b>Q11: As a provider, have you ever applied for reallocated funds?</b>	Yes
<b>Q12: Does the AA have a simple process to request a reallocation of funds?</b>	I am not sure
<b>Q13: Do you believe the process for reallocating funds ensures an efficient process?</b>	I am not sure
<b>Q14: Do you believe the process for reallocating funds ensures an expedient process?</b>	I am not sure
<b>Q15: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 4: Fiscal Audit

<b>Q16: Did your agency receive a fiscal auditing visit during the period March 1, 2013, through February 28, 2014?</b>	Yes
<b>Q17: If so, was an Entrance Conference conducted?</b>	Yes
<b>Q18: If so, was an Exit Conference conducted that included any finds and/or recommendations?</b>	I am not sure
<b>Q19: Did your agency receive a written report of the fiscal auditing visit?</b>	I am not sure
<b>Q20: Was your agency allowed at least 30 days to respond to the report and its finding?</b>	I am not sure
<b>Q21: Please add any additional comments regarding this series of questions.</b>	<i>Respondent skipped this question</i>

### PAGE 5: Billing & Reimbursement

<b>Q22: If appropriate, based on your role at your agency, did you receive training on the AA's billing process?</b>	Yes
<b>Q23: Is your agency reimbursed for accurate billings in a timely manner?</b>	Yes
<b>Q24: Provided that your agency did not have to make any corrections to a submitted billing, and based on the Notice of Proposed Payment sent to your agency, on average, how many business days does it take for your agency to be reimbursed by the Auditor from the day you submit the initial billing?</b>	31-45 Business Days



## 2013 - 2014 Assessment of the Administrative Mechanism - Provider Survey

**Q25: Between March 1, 2013 and February 28, 2014, were you notified that any billing invoices needed to be modified?** Yes

**Q26: On average, how many days was it between the day you submitted the initial invoice and the date you were notified that changes needed to be made?** 11-15 business days

**Q27: Have all reimbursement payments after corrections were made matched the revised/corrected invoice submitted to the AA?** I am not sure - please skip to question 29

**Q28: If you answered "No" to question 27, were you notified of the reasons that the payment did not match the invoice?** I am not sure

**Q29: Please add any additional comments regarding this series of questions.**

We did not receive a final NOPP to see why reasons for the last couple of months were not paid in full. There were reasons given for prior months. A final NOPP would be helpful in order to note the reasons on our end.

### PAGE 6: Technical Assistance

**Q30: Did you request any fiscal technical assistance from the AA or grant auditors during the grant year?** No - proceed to the next page

### PAGE 7

**Q31: If so, what technical assistance did you request?** *Respondent skipped this question*

**Q32: Did the AA comply with your request for technical assistance?** *Respondent skipped this question*

**Q33: Did the technical assistance meet your agency's needs?** *Respondent skipped this question*

**Q34: Please add any additional comments regarding this series of questions.** *Respondent skipped this question*

# Attachment C

---

CEO Key Informant Interview Transcript

## 2013-2014 Assessment of the Administrative Mechanism – Administrative Agency for Part A only

\*THE FOLLOWING QUESTIONS ARE PERTINENT TO RYAN WHITE PART A FUNDS ONLY.

### Executive Director (Aurora)

#### Planning Council

1. Describe your views on the following in regard to the Planning Council activities:
  - a. Allocations and Reallocations Processes
    - i. Over the past 6 years, the process has gotten a lot smoother. The process used to be problematic. Early on, the process was based more on emotion and not on data. Both the PC and the staff have done a great job focusing on the data. There is less emotion now, more thoughtful deliberation, so decisions are data driven.
  - b. Priority Setting Processes
    - i. I would say the same for the Priority Setting Process. Challenges going forward will be integrating care under the ACA, and enrolling as many clients as possible in the ACA.
  - c. Responsiveness to time-sensitive decision-making to ensure efficient and effective distribution of funds
    - i. I have not heard of any instance in the past year where we were up against a crunch for any kind of PC decision, and I think it's working really well right now. Laura is very good at keeping the PC on task and on schedule.

#### Policies

2. Describe your views on the following in regard to existing policies:
  - a. Effectiveness and thoroughness of existing fiscal policies
    - i. We could do a much better job on policies. One of the things I have to keep emphasizing to staff is that when policies change in Washington or the state, we need to codify that and get it out to the providers almost instantaneously. We need to do a better job of translating those policies that we expect our providers to implement.
    - ii. Describe specific strengths or weaknesses
      1. Strength – We understand policy and how important it is to follow the rules and regulations. We understand it and embrace it.
      2. Weakness – We just don't seem to want to put it in writing with our little logo on it!
  - b. The consistency of implementation of fiscal policies and practices

- i. At the beginning when we took the program back from AACOG, each auditor has been dogmatic about not having disallowed costs. The commitment on the part of the auditor in partnering with us to do training on fiscal policies and procedures and the commitment to doing fiscal audits, has kept us out of trouble. It has also kept our service providers on the right track and understanding that we're serious about following rules and regulation. We run a very compliant program. I think that's why we continue to have clean A-133 audits and we continue to have good results with our service providers when the auditors go out and do fiscal audits. Similarly with our program monitoring, we generally have very few findings, and when we do, they are corrected in 30 days.

### Admin Agency/Auditor's Office

3. Describe the impact of delayed or partial receipt of funding from federal and state sources, and how it affects the rapid allocation and distribution of funding to the areas of greatest need.
  - a. What contingencies or processes does Bexar County have in place to manage delays in federal or state funding awards?
    - i. When we get delayed or partial funding, it creates a great deal of anxiety in the community. It creates anxiety with our providers. They are non-profits, and are not able to "float" money for the federal government or the state. Their anxiety is increased because the county cannot reimburse unexpended funding. It's very unfair to the providers, to the AA, and extremely unfair to the people who depend upon these services.
    - ii. We don't have contingencies in place. We do our best to be ready for that funding and get it to the community as fast as possible. We sympathize with the providers, but there isn't much we can do. They have to make sure they have some other funding, or a line of credit at the bank, or some way to keep the services going until the funding comes along.
4. Describe your views on the efficiency of the working collaboration between the Administrative Agency staff and Bexar County Auditor's Office staff.
  - a. I think the AA staff and the Auditor's staff work very closely together. We pay for training for the auditors on grants management and the impact of the OMB circulars. We pay for equipment purchases for them to go off site and do fiscal audits. I think we have a symbiotic relationship. Not that they say we're doing everything right, but they have no compunction in saying "you should do it this way, not that way". And they're very good about

giving us technical assistance as well. Recently we ordered laptops with air cards, computers to review and monitor payments better and faster to help them do their jobs better.

5. In your opinion, what is the most commonly identified issue/concern identified by providers in regard to the allocation and distribution of funding to the areas of greatest need?
  - a. Service providers didn't like the fast turnaround time they had to provide their budgets so we could get contracts in place. That was the number one concern, that we weren't giving sufficient time to get their budget together. My opinion is that they've all been in business since the Ryan White program was established. It's not like they start the budget from scratch every year. It shouldn't present such an obstacle for them. You have to be agile and flexible, because funding could come in in an instant, or it could be later, you just have to be ready for it.

# Attachment D

---

**Administrative Agency Focus Group Interview Transcript**

## 2013-2014 Assessment of the Administrative Mechanism – Administrative Agency for Part A only

\*THE FOLLOWING QUESTIONS ARE PERTINENT TO RYAN WHITE PART A FUNDS ONLY.

### Program Manager and Fiscal Staff (Charlene, April, Crystal, Theresa)

#### Staff Demographics

1. Beginning March 1, 2013 to February 28, 2014, what was your position and role in the Administrative Agency (AA)?
  - a. Crystal – Fiscal Monitor for RWP – 2 years
  - b. Theresa – Fiscal Monitor for RWP – 1 month (Jan 2014)
  - c. April – Lead Fiscal Monitor for RWP – 3 years
  - d. Charlene – Program Manager for RWP – 6 years
  - e. Peggy – Contract Analyst – March-Oct of 2013 – 2014 (left)
  - f. Mario – Contract Analyst – Nov – Mar 2013-2014 (left)
  - g. April – new position Contract Analyst as of 4/2014
    - i. Note on Contract Analyst position for change of staff, no person available from grant period for interview.
2. How long have you been employed in the Bexar County Ryan White Program?
  - a. See above

#### Contract & Monitoring Process

3. Describe your involvement in the contracting process for 2013-2014.
  - a. Describe the AA's process beginning with notification to providers of funding awards through the execution of final contracts.
    - i. Received 3 NGA's last year. Formula & MAI in initial; (\$500k) Supplemental & Health Insurance 2<sup>nd</sup>; Final NGA. We develop contracts with the initial award, then create amendments for the subsequent awards. When providers get an amendment letter, that gets entered in ARIES and they have the final amount by service category of what they can spend. The providers get a Letter to Proceed that has their award amounts, and do not have to wait for contracts to begin services.

- b. How much time does the AA allow providers to submit grant budgets following their notice of funding award?
  - i. They had to submit budgets within 7 days. This has been lengthened to 10 days for 2014.
    - 1. Follow – up – why the change? Providers in assessment provided feedback to give more time for the budgets. When you have to create and update budgets three times its more difficult and cumbersome to make sure they all add up. We could request a twelve-month budget in March if HRSA would give us all the funding at once. Then 7 a day turnaround would be acceptable, but when you get multiple NGA's, you have to give them more time to make adjustments. This (change in 2014) is a process improvement based on the 2013 AAM.
- c. Upon receipt of the providers' budgets how much time does it take for the AA to draft a contract?
  - i. The contract occurs prior to and simultaneously to the budget process. Our contracts have to go to the DA's office. The old DA was accustomed to them, she ensured we had cited all the new requirements and incorporated any of our changes, such as the number of days we give providers to invoice. If things were negotiated during the year, they needed to be reflected in the contract. Our old DA would only give a cursory review. She retired in the fall, and the new person wanted to review contracts more thoroughly. The processing of the contracts then took a little bit longer. However, our office sent them to her early for the new HOPWA that began in February. We can ask for a budget as soon as we know what the allocated amount is as calculated from the percentages of the Planning Council while the contract process is ongoing at the DA. Hopefully we get the contract back from the DA timely, it is joined with the budget, then goes to the Auditor's Office for processing. The amount of time is 1-3 weeks for this process. While the contracts are being processed, they can begin work on "Letters to Proceed", so providers can begin work almost immediately. For the new Part A on March 1, letters to proceed went out in January.
    - 1. May be explanation for provider finding of delays in contract process.
- d. On average, how long does it take to finalize contracts with providers from the drafting of the contract to approval by Commissioners Court?
  - i. Approximately 5 weeks. This has not changed since last year.
- e. Do providers have internal review and approval processes that impact the time needed to finalize their contracts in Commissioners Court?



- i. Yes. UHS has a process that needs lawyer, board, and CEO approval. They take extra time and need encouragement to get their information into the AA on time. They take 6-7 weeks, if we're lucky. The other providers return contracts very quickly.
4. Describe the process for monitoring service provider expenditures.
- a. As a result of the expenditure monitoring, are funds reallocated?
    - a. Every month there is an agency review, and we review expenditures throughout the grant period. We also include anything that is pending to get a more accurate number. We send a checklist to the providers with percentages and where they are/should be, so they can tell if they're high or low, and what they need to do so they can get where they need to be. They receive this information once a month about 2 weeks prior to the meeting.
    - b. We recently sent the checklist and expense reports to our Part A PO. Our PO wanted to look at the templates to share with other jurisdictions, and commended us for our practices. We send the protocol and schedule to the agencies so if we have questions, we can call during a "window period" during the designated meeting time.
    - c. Sample questions on checklist:
      - i. Plans to reallocate funds?
      - ii. Budget revisions?
      - iii. Staff changes we may not be aware of?
      - iv. Issues with other subs?
      - v. Fluctuations in services provided?
      - vi. Purchasing any big-ticket items, such as furniture/equipment?
      - vii. MOU's for subcontractors?
      - viii. Concerns/TA?
    - d. Yes, funds are reallocated as a result of monitoring.
  - b. How long does it take to reallocate funds?
    - a. About a week, unless we have to request approval from the PC. If it's under the 10% we can reallocate ourselves, it moves quickly. This is the same as 2013.
  - c. Are there any other parties who must approve the reallocation of funds? If yes, how does this impact the time to reallocate?
    - a. If the amount is outside the 10%, the reallocation goes to the PC.
      - i. Follow-up – Does the PC have an impact on the timeline?
        - 1. The committee can convene at any time – Laura is in the loop when we do any of the Part A, so she knows whether there is a meeting that can address it, or

- does she need to call a meeting to address critical needs.
2. Nothing goes beyond a 30-day period. Even over the holidays, just the PC chair & co-chair can reallocate so there are no delays.

### Provider Reimbursement Process

5. Describe your involvement in the provider reimbursement (billing) process in March 1, 2013 to February 28, 2014.
  - a. We divide the Part A providers between the two fiscal monitors. One has three and the other has one.
  - b. (Single site) When I receive the invoice, I check the documents, and when done, I check ARIES. If everything matches, I submit it to the ADO and/or the PM, and then the ED for signature. Once it is signed, it goes to the Auditor's office.
  - c. (3 Sites) I check ARIES first to ensure services were provided and to make sure clients are not over income. Then check the services on the actual invoice to check those clients. I check other documentation to make sure it's all recorded, and then I send it to the ADO and/or the PM, and then the ED and then the Auditor's office.
  - d. There was a bit of a change – in 2013 the invoices went to the ADO and/or the PM. Now they go to the Contract Analyst and then to the ED. It has a slightly different verification process now.
  - e. In 2013, Delia was the ADO under Aurora. She was on the RW budget to do fiscal oversight and budgets. She initialed the checklist, then it went to Aurora. She retired in Sept 2013, so the CA inherited the responsibility.
    - i. 2013 – ADO/PM – Aurora
    - ii. 2014 – CA – Aurora
  - f. Also, based on the feedback of prior year AAM's, we've begun a tracking sheet. It includes extensive information on whether appropriate information is included, with notes regarding missing items. It's called the Ryan White Tracking Sheet. Aurora gives A+s if all invoices are under 14 business days to process!!
  - g. A couple of agencies have asked if they could bill more often, and we've allowed it to help with cash-flow problems. They just have to request it, and we'll process their invoices more often.
6. Describe the reimbursement process from the submission of billing requests to payment disbursement.
  - a. Covered in 5 above.
7. What is the average time it takes for AA staff to process invoices and send them to the Auditor's office for payment?
  - a. 14 business days or fewer.
8. Please describe any technical assistance provided to service providers that focused on fiscal related issues during the review period.

- a. The Monthly Status Report is reviewed by the PM and shows what TA has been provided to each provider. Provided TA on time sheets and did a visit with a provider to improve expenditures. Worked with another site on Program Income and their Fiscal Audit (time sheets). (Staff will send documentation of all TA for grant period.)

### Reallocation Process

9. Describe your involvement in the reallocation processes throughout 2013-2014?
  - a. A memo format was used that summarized what the reallocated amount was, where it came from, where it was being moved, and the timeline for the budgets would go out either in e-mail or in an award letter. If it changed the contract amount, it would be an amendment letter. (the memo was internal). This would be Cc'd internally so ARIES could be updated with the amounts that were changing. It could also go to the PC whether or not it was over the 10% just to keep them informed of changes.
10. Do you believe the process for reallocating funds i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process?
  - a. Works well for us.
11. Why?
  - a. There is very good communication between us and the PC. They make every effort to do what is needed. (Reference prior response.)
12. Do you believe the process for reallocating funds i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process?
  - a. Also works well for us.
13. Why?
  - a. Well integrated in our processes. Money is moved quickly where it needs to go and where it will do the most good.

# Attachment E

---

**Planning Council Staff Focus Group Interview Transcript**

## 2013-2014 Assessment of the Administrative Mechanism – Administrative Agency for Part A only

\*THE FOLLOWING QUESTIONS ARE PERTINENT TO RYAN WHITE PART A FUNDS ONLY.

### Planning Council Liaison & HIV Planner (Laura, Allison)

#### Staff Demographics

1. Beginning March 1, 2013 to February 28, 2014, what was your position and role in the Administrative Agency (AA)?
  - a. PC Liaison – be the liaison between PC and AA
  - b. HIV Planner – help allocate funding between providers & ensure reporting was completed. I also worked with PC to provide data and support.
2. How long have you been employed in the Bexar County Ryan White Program?
  - a. 5 years/2 mos
  - b. 5 years/1 month (☹)

#### PSRA Process

3. Describe your involvement in the Priority Setting and Resource Allocations (PSRA) process in 2013-2014.
  - a. I facilitated the initial meeting between the AA and the fiscal monitoring and reallocations committee. The meeting was held to decide what data was needed to make the best decisions on priority setting. Would work with planner to get any info that was needed, then distribute to PC for their review before the actual PS meeting. At the PS meeting, planner would present most if not all of the data, and I would explain the process of how to rank categories and allocate resources, and then tally the rankings as they were voted on.
  - b. I prepared the data, attended all the meetings, and presented all the data the PC had requested. I would run reports from ARIES and the most recent NA and expenditure reports to pull the data together. The final Part A Implementation Plan table was used as a template, as well as Epi data so they could identify trends. We always included 3 years worth of data. I also developed a power point presentation so they could see what the trends were, as well as information on the ACA and it's impact on RW. Data was developed for Part A and MAI separately.
4. In your opinion, do you believe the current PSRA process is efficient in meeting its required charge of rapidly allocating funding to the areas of greatest need? Why?

- a. I believe it is – we’ve used the same process for a few years now, and with what the data is showing us, we’ve been pretty much on point with where the allocations should be. There have been few instances where we weren’t able to accurately project allocations for various reasons, but the process itself has made it faster and easier to disburse those funds.
  - b. I also think it is – the proposed future process of looking at data on one day and then making the allocations the next will be more efficient. The process has created a good template so the PC can see what’s going on. They like to be able to look at one category’s information separate from all the other categories, and it seems to work well. There was also an aggregated format with all services so the PC could pick and choose how they wanted to look at it.
5. For the period being assessed, what examples can you give that demonstrate how the process:
- a. Works well,
    - i. See b above. Providing multiple formats for people who understand things differently.
    - ii. The data is now well organized with nice packets for the PC members. Data information packets were designed for the PC members in a logical and user-friendly manner, ensuring the PC had all the information they needed.
    - iii. The formalized data presentation process works well, also.
    - iv. The process is more data driven now as opposed to an emotional process. We had passionate pleas for various services, but now it’s become a data-driven process, and the PC prides itself on that.
    - v. More people are getting involved in the process and it’s more of a “group effort” across volunteers, staff, etc. More people are contributing to the process who may have been silent in the past.
  - b. Has gaps, or
    - i. Sometimes there is too much involvement from the AA staff as far as suggestions that may influence decision-making. However, there are some situations where the PC members may not understand, and the AA has to provide more info – so it’s a delicate tight rope to walk to not provide too much input or too little.
    - ii. Sometimes there is too much information for the PC members to digest, so it could improve the process if it were stretched out to two days, not necessarily concurrent, so they could have more time to understand the data used to make the allocations.
  - c. Creates barriers
    - i. The levels of education/familiarity of the PC members sometimes requires us to do more when we could be doing more training to bring them as close to the same level of understanding as possible.

### Reallocation Process

6. Describe your involvement in the reallocation processes throughout 2013-2014?

- a. Each month there is a monthly agency review, so the AA would bring to the PC suggested reallocations to make if they exceeded the discretionary 10% rule. I would help draft those memos for the PC and help make suggestions for reallocations. Even reallocations below 10% would be shared with the PC so they were aware of what changes were being made without their prior review.
  - b. My role was to ensure we had the memos and current expenditure reports for the meetings. When I reviewed the expenditure reports and had questions, I would bring it to the AA's attention that an issue may come up in committee.
7. Describe the process by which reallocations are made, and how is the need for reallocation determined?
- a. During the MARs the AA reviewed where agencies were in spending. If it was getting later in the year, it was really important to look at expenditures and make sure they were at the level they should be.
  - b. Also, the AA wouldn't just move the funds, there would be an inquiry into the agency and why the money wasn't being spent, whether they wanted to move it to another category, or had a plan to spend it.
  - c. Also, if there was a request from an agency, the AA would in turn look to see if there were funds that weren't being used in the best way, that could potentially be moved to fulfill those needs.
  - d. Once the funding to be moved is determined, then the reallocation process begins. If it is below 10%, the AA could proceed without PC approval and send letters to the providers notifying them that there is funding available. All intra-category changes are made with no involvement by the PC.
  - e. If the PC needs to be involved, that's when the memo is created. It is then sent to the Fiscal Monitoring & Reallocations committee, and then receives final approval by the PC at large.
  - f. In the 3<sup>rd</sup> and 4<sup>th</sup> quarter of the year, the AA can move more than 10% funding if it has the approval of just the co-chairs of the PC and the chair of the FMRA committee if there are no scheduled or planned meetings of the PC.
  - g. If during the review of the expenditure reports the FMRA committee sees something that was not previously noted, they can initiate reallocations themselves.
8. Do you believe the process for reallocating funds i.e., the AA's 10% discretion, or Planning Council approval ensures an expedient process? How?
- a. Yes – because of the fact of the new provisions that were put into the policy for moving funding more easily in the 3<sup>rd</sup> and 4<sup>th</sup> quarter. Because of the schedule, sometimes the PC can't meet right away, so it works well allowing funds to be moved even when there isn't a scheduled PC meeting.

9. Do you believe the process for reallocating funds i.e., the AA's 10% discretion, or Planning Council approval ensures an efficient process? How?
  - a. The process we have in place has fostered a trusting relationship between the PC and the AA. This trust factor leads to a more efficient process because it removes the barriers that might have been caused otherwise.
  - b. The monthly agency reviews are now also a much more efficient process. There is a checklist sent to providers of the information that is needed. There are scheduled times to call people, which seems to be a much more efficient process.
  - c. A 'letter of amendment' is sent to the providers so the contracts don't have to go through commissioner's court for all the amendments.
  
10. Describe the process for reviewing service provider expenditures to ensure grant funds are "on track" for timely year-to-date expenditures.
  - a. Monthly agency review process – once per month various AA staff get together and review the most current expenditures for the providers. They also review invoices and expenditures that might be pending that are not yet reflected on the spreadsheets.
  - b. Prior to this meeting, a checklist is sent to providers asking them to explain their overages/shortages. A time window is given to them so they're able to call and explain their plan to get their expenditures in line. The checklist is sort of a guide. Crystal now types up minutes to the meeting so everyone knows what's going on and it is all formalized.



# Attachment F

---

**Auditor's Office Focus Group Interview Transcript**

## 2013-2014 Assessment of the Administrative Mechanism – Administrative Agency for Part A only

**\*THE FOLLOWING QUESTIONS ARE PERTINENT TO RYAN WHITE PART A FUNDS ONLY.**

### Auditor's (Van, Norma)

1. For the period March 1, 2013 to February 28, 2014, what was your position and role in the Auditor's Office?
  - a. Response 1: Grants Accountant
  - b. Response 2: Grant Manager
2. How long have you been processing invoices for the Bexar County Ryan White Program?
  - a. Response 1: 14 months
  - b. Response 2: Supervise – 16 years
3. Describe your involvement in the provider reimbursement (billing) process in 2013 – 2014.
  - a. Response 1: Receive invoices from fiscal monitors; review invoices, spot check them; process for payment in the county system.
  - b. Response 2: Review invoices created by Grants Accountant.
4. Describe the reimbursement process from the submission of billing requests to payment disbursement, including estimated timelines.
  - a. Response 1:
    - i. Receive to spot check - probably 4-5 days
    - ii. Spot check to process – depends on size of invoice – from a few hours to a couple of days. Also depends on errors in invoices.
5. In your opinion, what is the most commonly identified issue/concern regarding billing/reimbursements?
  - a. Response 1: It has improved incredibly compared to last year. I don't find too many errors, if there are any, they might be in a missing document, but very rare. Maybe discrepancies on the payment request form, such as numbers transposed or in the wrong account category – but rare.

### Provado Question

Last year there were some slight issues with mistakes remaining on bills when they arrived at the Auditor's office. Has this issue been resolved since the last grant period?

Mistakes have been addressed. Mistakes still happen, but rarely, and there is nothing consistently that I can pinpoint.