



Strategic Planning Committee
Behavioral Science Research Corp.
2121 Ponce de Leon Boulevard, Suite 240, Coral Gables, FL 33134
April 12, 2024 Minutes

Approved May 10, 2024

#	Members	Present	Absent
1	Cardwell, Joanna	x	
2	Hunter, Tabitha		x
3	Machado, Angela	x	
4	Mooss, Angela		x
5	Poblete, Karen		x
6	Sheehan, Diana M.		x
7	Singh, Hardeep	x	
Quorum = 3			

Guests	
Marquez, Jamie	
Medina, Jesus	
Valle-Schwenk, Carla	
Williams, Stephen	
Staff	
Bontempo, Christina	
Ladner, Robert	

Note: All documents referenced in these minutes are on file and were accessible to members and the public prior to (and during) the meeting, at www.aidsnet.org/the-partnership#strategicplanning1.

I. Call to Order

Committee Vice Chair, Angela Machado called the meeting to order at 10:05 a.m.

II. Introductions

Members, guests, and staff introduced themselves, and Ms. Machado identified Behavioral Science Research Corp. (BSR) staff as the resource persons.

III. Housekeeping/Meeting Rules

Ms. Machado reviewed the *Meeting Housekeeping* PowerPoint, which includes general reminders, code of conduct, people-first language, and meeting participation best practices.

IV. Floor Open to the Public

Ms. Machado opened the floor to the public with the following statement:

Pursuant to Florida Sunshine Law, I want to provide the public with a reasonable opportunity to be heard on any item on our agenda today. If there is anyone who wishes to be heard, I invite you to speak now. Each person will be given three minutes to speak. Please begin by stating your name and address for the record before you talk about your concerns. BSR has a dedicated telephone line as well as a general email address for statements to be read into the record. No statements were received via the telephone line or email.

There were no comments, so the floor was then closed.

V. Review/Approve Agenda

Members reviewed the agenda and approved it with no changes.

Motion to approve the agenda as presented.

Moved: Joanna Cardwell

Seconded: Hardeep Singh

Motion: Passed

VI. Review the Minutes of March 8, 2024

Members reviewed the minutes of March 8, 2024, and approved the minutes with no changes.

Motion to approve the minutes of March 8, 2024 as presented.

Moved: Hardeep Singh

Seconded: Joanne Cardwell

Motion: Passed

VII. Reports

▪ **Membership**

Ms. Machado announced that member and former Vice Chair, Dr. Angela Mooss, will have completed her six-year term at the end of this month. Members thanked her for her service.

Stephanie Stonestreet submitted an application for membership. Ms. Stonestreet introduced herself and stated her interest in membership. Members voted to accept Ms. Stonestreet as a new member.

Motion to approve Stephanie Stonestreet as a new member of the Strategic Planning Committee.

Moved: Hardeep Singh

Seconded: Joanna Cardwell

Motion: Passed

There are still many vacancies on the Partnership and Committees; however, staff announced the Community Coalition will put forward several candidates at the May 13 Partnership meeting.

▪ **Partnership Report to the Committee**

The Partnership report for March 18, 2024, was posted online. Members re-elected Alecia Tramel-McIntyre as Chair and Harold McIntyre as Vice Chair and reviewed the motion from Strategic Planning to seek guidance from HRSA on the schedule of surveys for the Assessment of the Administrative Mechanism. That item will be addressed later in the meeting.

VIII. Standing Business

▪ **Assessment of the Recipient Administrative Mechanism (AAM)**

□ **Response from HRSA re Request on Surveys and Reporting**

Last month, members put forward the motion, “for BSR staff to request guidance from our HRSA Project Officer to assess implementing a two-year AAM rapid cycle to allow for survey administration one year and follow up on an action plan resulting from the survey results in the next year.” The legislation requires an evaluation to assess the Recipient in rapidly dispersing funds and responding to Planning Council directives each year. Therefore, members agreed to maintain the previous survey structure and add follow up questions, specifically for gathering feedback on “disagree” or “strongly disagree” responses. Members also agreed to establish an action plan for tracking the progress of issues raised by survey responses.

□ **2024 Action Plan and Draft Surveys Review**

Staff will draft the action plan and revised surveys based on today's meeting feedback for review in May; included in these minutes as:

- Attachment #1: AAM FY2024 Partnership Member Survey
- Attachment #2: AAM FY2024 Ryan White Program Subrecipient Survey
- Attachment #3: 2024 Action Plan

□ **Updates to 2024 Schedule of Meetings and Agenda Topics**

Members received an updated schedule indicating the revised timing and activities around the AAM. Staff will correct a typo; no other changes were indicated. Members had previously voted to accept the schedule with the AAM changes; no further action was needed.

IX. New Business

▪ **2024 Annual Report**

Members agreed to maintain the layout and data elements of the 2023 Annual Report and review updates at their next meeting. The color scheme will be updated to differentiate the 2022 version from the 2023 version.

X. Announcements and Open Discussion

Staff announced the April 25 Prevention Committee meeting will include presentations on Project T-SHARP and HPTN 096: Building Equity Through Advocacy; and advised there are opportunities for presentations to the Prevention Committee if anyone has a topic of interest. Staff announced the April 17 Needs Assessment training and the complete schedule of Needs Assessment meetings, and included flyers in the meeting presentation.

XI. Next Meeting

Ms. Machado announced the next meeting is scheduled for May 10, 2024, at BSR Corp.

XII. Adjournment

Ms. Machado adjourned the meeting at 11:53 a.m.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

Miami-Dade HIV/AIDS Partnership Member Survey
REVIEW VERSION FOR SPC MEMBERS

The Assessment of the Recipient Administrative Mechanism (AAM) is a Health Resources and Services Administration (HRSA)-mandated evaluation, and a major activity of the Miami-Dade HIV/AIDS Partnership Strategic Planning Committee.

This AAM survey covers the activities of the Ryan White Program grant Recipient: The Miami-Dade County Office of Management and Budget-Grants Coordination, during the Ryan White Program (RWP) Fiscal Year FY 2023-2024: March 1, 2023-February 29, 2024.

All Miami-Dade HIV/AIDS Partnership members who were appointed prior to February 2024, must complete this survey, no later than June 28, 2024.

A separate survey will be distributed to Ryan White Program Part A/MAI-funded subrecipients addressing these issues and other concerns. If you are a Partnership member and you represent a subrecipient, you are asked to complete two surveys.

Responses are tallied and reported in aggregate form without identifying information.

Thank you!

* 1. Please enter your First and Last Name (Your name is required for tracking responses and will not be included in the final report.)

Name



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 2. The Miami-Dade County Office of Management and Budget-Grants Coordination (“the Recipient”) kept the Partnership well informed of policies, procedures, and updates from HRSA which impact the Ryan White Program.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

3. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Miami-Dade County Office of Management and Budget-Grants Coordination (“the Recipient”) kept the Partnership well informed of policies, procedures, and updates from HRSA which impact the Ryan White Program*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 4. I understand the information presented on the Recipient’s Ryan White Program Part A/Minority AIDS Initiative (MAI) expenditure reports. (See Reports, below).

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)

Part A Expenditure Report (End of Year Summary)

RYAN WHITE PART A GRANT AWARD (Grant #: BURW3201)
 EARMARK ALLOCATION AND EXPENDITURE RECONCILIATION SCHEDULE YR32
 FORMULA AND SUPPLEMENTAL FUNDING
 Per Resolution #S: R-1162-21, R-246-20, R-247-20 & R-817-19

Project #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount Formula	16,141,360.00	FORMULA
Grant Award Amount Supplemental	4,121,835.00	SUPPLEMENTAL
Grant Award Amount FY 2021 Supplemental	4,296,875.00	FY SUPPLEMENTAL
Carryover Award F(21) Formula	4,076,477.00	CARRYOVER
Total Award	\$ 28,636,547.00	

CONTRACT ALLOCATIONS/ FORMULA, SUPPLEMENTAL & CARRYOVER		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance	54,422.00	
2 Health Insurance Services	336,775.00	256,024.00
3 Medical Case Management	5,826,737.00	400,000.00
4 Mental Health Therapy/Counseling	51,237.00	91,457.00
5 Oral Health Care	2,894,445.00	1,000,000.00
6 Outpatient/Ambulatory Health Svcs	3,695,763.00	900,000.00
7 Substance Abuse - Outpatient	28,099.00	17,369.00
CORE Services Totals:	20,256,269.00	20,256,269.00
Support Services		
8 Emergency Financial Assistance	9,853.00	
9 Food Bank	1,890,108.00	1,000,000.00
10 Medical Transportation	206,612.00	
11 Other Professional Services	154,449.00	
12 Outreach Services	175,098.00	
13 Substance Abuse - Residential	1,338,405.00	200,000.00
SUPPORT Services Totals:	4,750,514.00	1,200,000.00
DIRECT SERVICES TOTAL:	\$ 25,006,783.00	
Total Core Allocation	17,886,545.00	
Target at least 80% core service allocation	17,149,850.40	
Current Difference (Short) / Over	\$ 736,694.60	
Recipient Admin. (GC, GTL, BSR Staff)	\$ 2,453,269.00	
Quality Management	\$ 641,522.00	
(+) Unobligated Funds / (-) Over Obligated:		
Unobligated Funds (Formula & Supp)	\$ -	
Unobligated Funds (Carry Over)	\$ 3,802,458.00	28,608,571.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
1 AIDS Pharmaceutical Assistance	560810000	3,084.10	
2 Health Insurance Services	5606620000	207,151.61	0.00
3 Medical Case Management	560870000	5,414,520.00	0.00
4 Mental Health Therapy/Counseling	560860000	51,237.00	12,333.00
5 Oral Health Care	560660000	2,894,445.00	400,169.50
6 Outpatient/Ambulatory Health Svcs	5608910000	8,093,884.64	0.00
7 Substance Abuse - Outpatient	5608910000	4,401.00	0.00
CORE Services Totals:		17,121,128.85	412,502.50
Support Services			
8 Emergency Financial Assistance	5608940000	0.00	
9 Food Bank	5606650000	1,540,894.00	1,000,000.00
10 Medical Transportation	5608480000	153,894.90	
11 Other Professional Services	5608690000	87,581.00	
12 Outreach Services	5606650000	114,924.88	
13 Substance Abuse - Residential	5608930000	1,053,590.00	0.00
SUPPORT Services Total:		3,850,884.78	1,000,000.00
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 21,051,990.61	84.19%
Formula Expenditure %		95.52%	
5608710000 Recipient Administration		1,937,858.51	
5608880000 Quality Management		620,491.00	2,558,450.57
Grant Unexpended Balance		FY 2022 Award 2,343,185.38	Carryover 2,654,944.50
Total Grant Expenditures & %		\$ 23,610,441.12	82.53%
Core medical % against Total Direct Service Expenditures (Not including CIO):		85.07%	Within Limit
Quality Management % of Total Award (Not including CIO):		2.53%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):		7.80%	Within Limit

Printed on: 9/11/2023

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Minority AIDS Initiative Expenditure Report (End of Year Summary)

RYAN WHITE PART A GRANT AWARD (Grant#: BURW3201)
 EARMARK ALLOCATION AND EXPENDITURE RECONCILIATION SCHEDULE YR32
 MINORITY AIDS INITIATIVE (MAI) FUNDING
 Per Resolution #S: R-1162-21, R-246-20, R-247-20 & R-817-19

PROJECT #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount MAI	1,058,460.00	MAI
Grant Award Amount FY20 MAI	1,623,771.00	FY MAI
Carryover Award FY21 MAI	1,212,670.00	MAI_CARRYOVER
Total Award	\$ 3,925,921.00	

CONTRACT ALLOCATIONS		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance		
2 Health Insurance Services		
3 Medical Case Management	803,620.00	
4 Mental Health Therapy/Counseling	18,900.00	
5 Oral Health Care	1,368,681.00	
6 Outpatient/Ambulatory Health Svcs	8,098.00	2,287,569.00
7 Substance Abuse - Outpatient		
Support Services		
8 Emergency Financial Assistance	0.00	
9 Food Bank		
10 Medical Transportation	7,628.00	
11 Other Professional Services		
12 Outreach Services	39,216.00	
13 Substance Abuse - Residential		47,444.00
DIRECT SERVICES TOTAL:	\$ 2,335,043.00	2,335,013.00
Total Core Allocation	2,287,569.00	
Target at least 60% core service allocation	1,888,034.40	
Current Difference (Short) / Over	\$ 419,534.60	
Recipient Admin. (OMB-GC)	\$ 271,325.00	3,925,921.00
Quality Management	\$ 106,883.00	
(+) Unobligated Funds / (-) Over Obligated:		
Unobligated Funds (MAI)	\$ -	379,208.00
Unobligated Funds (Carry Over)	\$ 1,212,670.00	2,713,251.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
1 AIDS Pharmaceutical Assistance	560870000		
2 Health Insurance Services	5606620000		
3 Medical Case Management	560870000	616,302.85	
4 Mental Health Therapy/Counseling	560860000	1,007.50	
5 Oral Health Care	560660000		
6 Outpatient/Ambulatory Health Svcs	5608910000	850,366.80	
7 Substance Abuse - Outpatient	5608910000	570.00	1,278,247.15
Support Services			
8 Emergency Financial Assistance	5608940000	0.00	
9 Food Bank	5606650000		
10 Medical Transportation	5608480000	5,647.59	
11 Other Professional Services	5608690000		
12 Outreach Services	5606650000	36,498.00	
13 Substance Abuse - Residential	5608930000		42,145.50
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 1,320,392.74	56.55%
5608710000 Recipient Administration		211,670.40	
5608880000 Quality Management		106,883.00	316,553.40
Grant Unexpended Balance		FY 2022 Award 1,074,304.86	Carryover 2,286,974.86
Total Grant Expenditures & % (Including CIO):		\$ 1,638,948.14	41.75%
Core medical % against Total Direct Service Expenditures (Not including CIO):		96.81%	Within Limit
Quality Management % of Total Award (Not including CIO):		3.84%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):		7.80%	Within Limit

Printed on: 9/11/2023

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Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

5. For a rating of "Disagree" or "Strongly Disagree" to the statement: *I understand the information presented on the Recipient's Ryan White Program Part A/Minority AIDS Initiative (MAI) expenditure reports*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 6. The Recipient followed the Partnership's recommendations for service priorities and resource allocations. (See Reports, below).

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]

Part A Expenditure Report (End of Year Summary)

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Project #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount Formula	16,141,360.00	FORMULA
Grant Award Amount Supplemental	4,121,835.00	SUPPLEMENTAL
Grant Award Amount FY 2021 Supplemental	4,296,875.00	FY SUPPLEMENTAL
Carryover Award F(21) Formula	4,076,477.00	CARRYOVER
Total Award	\$ 28,636,547.00	

CONTRACT ALLOCATIONS/ FORMULA, SUPPLEMENTAL & CARRYOVER		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance	54,422.00	256,024.00
2 Health Insurance Services	336,775.00	400,000.00
3 Medical Case Management	5,826,737.00	91,457.00
4 Mental Health Therapy/Counseling	51,237.00	1,000,000.00
5 Oral Health Care	2,894,445.00	900,000.00
6 Outpatient/Ambulatory Health Svcs	3,695,763.00	17,369.00
7 Substance Abuse - Outpatient	28,099.00	
CORE Services Totals:	20,256,269.00	30,256,269.00
Support Services		
8 Emergency Financial Assistance	9,853.00	1,000,000.00
9 Food Bank	1,890,108.00	206,912.00
10 Medical Transportation	206,912.00	154,449.00
11 Other Professional Services	154,449.00	175,098.00
12 Outreach Services	175,098.00	1,338,405.00
13 Substance Abuse - Residential	1,338,405.00	
SUPPORT Services Totals:	4,750,614.00	2,500,411.00
DIRECT SERVICES TOTAL:	\$ 25,006,883.00	
Total Core Allocation	17,836,545.00	
Target at least 80% core service allocation	17,146,850.40	
Current Difference (Short) / Over	\$ 689,694.60	
Recipient Admin. (GC, GTL, BSR Staff)	\$ 2,453,269.00	
Quality Management	\$ 641,522.00	
(+) Unobligated Funds / (-) Over Obligated:		
Unobligated Funds (Formula & Supp)	\$ -	
Unobligated Funds (Carry Over)	\$ 507,727.00	3,802,458.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
1 AIDS Pharmaceutical Assistance	500810000	3,084.10	0.00
2 Health Insurance Services	500662000	207,151.61	297,151.61
3 Medical Case Management	500870000	5,414,520.00	0.00
4 Mental Health Therapy/Counseling	500860000	51,237.00	12,333.00
5 Oral Health Care	500660000	2,894,445.00	406,169.50
6 Outpatient/Ambulatory Health Svcs	500891000	8,093,884.64	0.00
7 Substance Abuse - Outpatient	500891000	4,401.00	4,401.00
CORE Services Totals:		17,121,128.85	710,954.11
Support Services			
8 Emergency Financial Assistance	500940000	0.00	0.00
9 Food Bank	500660000	1,540,894.00	1,000,000.00
10 Medical Transportation	500640000	153,904.90	2,540,894.00
11 Other Professional Services	500890000	87,581.00	
12 Outreach Services	500660000	114,204.88	
13 Substance Abuse - Residential	500990000	1,053,590.00	0.00
SUPPORT Services Total:		3,850,864.78	2,540,894.00
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 21,051,993.63	84.19%
Formula Expenditure %		95.52%	
5008710000 Recipient Administration		1,937,858.51	
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Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

7. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient followed the Partnership's recommendations for service priorities and resource allocations*, please explain your concern and suggest a solution to the problem.

[Empty text box for explanation]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 8. The Recipient effectively administered Part A/MAI funds according to priorities set by the Partnership. (See Reports, below).

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]

Part A Expenditure Report (End of Year Summary)

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DIRECT SERVICES TOTAL:		\$ 25,006,883.00
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Quality Management	\$ 641,522.00	
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Unobligated Funds (Formula & Supp)	\$ -	
Unobligated Funds (Carry Over)	\$ 567,727.00	3,802,458.00
		25,608,571.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
500810000 AIDS Pharmaceutical Assistance		3,084.10	
500820000 Health Insurance Services	665,700	207,151.61	0.00
500870000 Medical Case Management	6,226,737	5,414,520.00	0.00
500880000 Mental Health Therapy/Counseling	142,694	51,237.00	12,333.00
500890000 Oral Health Care	3,894,445	2,894,445.00	400,169.50
500901000 Outpatient/Ambulatory Health Svcs	9,295,763	8,093,884.64	0.00
500902000 Substance Abuse - Outpatient	45,466	4,401.00	0.00
CORE Services Totals:		17,121,128.85	
Support Services			
500940000 Emergency Financial Assistance		0.00	
500950000 Food Bank	2,660,108	1,540,894.00	1,000,000.00
500960000 Medical Transportation		153,894.90	
500970000 Other Professional Services		87,581.00	
500980000 Outreach Services		114,924.86	
500990000 Substance Abuse - Residential	1,538,406	1,053,590.00	0.00
SUPPORT Services Total:		3,850,884.76	
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 21,051,990.61	84.19%
Formula Expenditure %		95.52%	
5008710000 Recipient Administration		1,937,858.51	
500880000 Quality Management		620,491.00	2,558,450.57
Grant Unexpended Balance		FY 2022 Award 2,343,185.38	Carryover 2,654,944.50
			4,998,129.88
Total Grant Expenditures & %		\$ 23,610,441.12	82.53%
Core medical % against Total Direct Service Expenditures (Not including CIO):		85.07%	Within Limit
Quality Management % of Total Award (Not including CIO):		2.53%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):		7.80%	Within Limit

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Minority AIDS Initiative Expenditure Report (End of Year Summary)

RYAN WHITE PART A GRANT AWARD (Grant#: BURW3201)
 EARMARK ALLOCATION AND EXPENDITURE RECONCILIATION SCHEDULE YR32
 MINORITY AIDS INITIATIVE (MAI) FUNDING
 Per Resolution #S: R-1162-21, R-246-20, R-247-20 & R-817-19

PROJECT #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount MAI	1,058,460.00	MAI
Grant Award Amount FY20 MAI	1,623,771.00	FY MAI
Carryover Award FY21 MAI	1,212,670.00	MAI_CARRYOVER
Total Award	\$ 3,925,921.00	

CONTRACT ALLOCATIONS		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance		
2 Health Insurance Services		
3 Medical Case Management	803,620.00	
4 Mental Health Therapy/Counseling	18,900.00	
5 Oral Health Care	1,368,681.00	
6 Outpatient/Ambulatory Health Svcs	8,098.00	2,287,569.00
7 Substance Abuse - Outpatient		
Support Services		
8 Emergency Financial Assistance	0.00	
9 Food Bank		
10 Medical Transportation	7,628.00	
11 Other Professional Services		
12 Outreach Services	39,216.00	
13 Substance Abuse - Residential		47,444.00
DIRECT SERVICES TOTAL:		\$ 2,335,043.00
Total Core Allocation	2,287,569.00	
Target at least 60% core service allocation	1,888,034.40	
Current Difference (Short) / Over	\$ 419,534.60	
Recipient Admin. (OMB-GC)	\$ 271,325.00	
Quality Management	\$ 106,883.00	
(+) Unobligated Funds / (-) Over Obligated:		
Unobligated Funds (MAI)	\$ -	
Unobligated Funds (Carry Over)	\$ 1,212,670.00	379,208.00
		2,713,251.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
500870000 AIDS Pharmaceutical Assistance			
500880000 Health Insurance Services			
500870000 Medical Case Management		616,302.85	
500880000 Mental Health Therapy/Counseling		1,007.50	
500890000 Oral Health Care			
500891000 Outpatient/Ambulatory Health Svcs		850,366.80	
500891000 Substance Abuse - Outpatient		570.00	
Support Services			
500940000 Emergency Financial Assistance		0.00	
500950000 Food Bank			
500960000 Medical Transportation		5,647.59	
500970000 Other Professional Services			
500980000 Outreach Services		36,498.00	
500990000 Substance Abuse - Residential			42,145.50
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 1,320,392.74	56.55%
Recipient Administration	5008710000	211,670.40	
Quality Management	5008800000	106,883.00	316,553.40
Grant Unexpended Balance		FY 2022 Award 1,074,304.86	Carryover 2,287,674.86
			3,361,979.72
Total Grant Expenditures & % (Including CIO):		\$ 1,638,948.14	41.75%
Core medical % against Total Direct Service Expenditures (Not including CIO):		96.81%	Within Limit
Quality Management % of Total Award (Not including CIO):		3.84%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):		7.80%	Within Limit

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Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

9. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient effectively administered Part A/MAI funds according to priorities set by the Partnership*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 10. The Recipient communicated clearly to the Partnership on expenditure changes related to the Part A/MAI sweeps/reallocation process. (See Reports, below).

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]

Part A Expenditure Report (End of Year Summary)

RYAN WHITE PART A GRANT AWARD (Grant #: BURW3201)
 EARMARK ALLOCATION AND EXPENDITURE RECONCILIATION SCHEDULE YR32
 FORMULA AND SUPPLEMENTAL FUNDING
 Per Resolution #S: R-1162-21, R-246-20, R-247-20 & R-817-19

Project #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount Formula	16,141,360.00	FORMULA
Grant Award Amount Supplemental	4,121,835.00	SUPPLEMENTAL
Grant Award Amount FY 2021 Supplemental	4,296,875.00	FY SUPPLEMENTAL
Carryover Award F(21) Formula	4,076,477.00	CARRYOVER
Total Award	\$ 28,636,547.00	

CONTRACT ALLOCATIONS/ FORMULA, SUPPLEMENTAL & CARRYOVER		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance	54,422.00	
2 Health Insurance Services	335,775.00	256,024.00
3 Medical Case Management	5,826,737.00	400,000.00
4 Mental Health Therapy/Counseling	51,237.00	91,457.00
5 Oral Health Care	2,894,445.00	1,000,000.00
6 Outpatient/Ambulatory Health Svcs	3,695,763.00	900,000.00
7 Substance Abuse - Outpatient	28,099.00	17,369.00
CORE Services Totals:	20,256,269.00	20,256,269.00
Support Services		
8 Emergency Financial Assistance	9,853.00	
9 Food Bank	1,890,108.00	1,000,000.00
10 Medical Transportation	206,612.00	
11 Other Professional Services	154,449.00	
12 Outreach Services	175,098.00	
13 Substance Abuse - Residential	1,338,405.00	200,000.00
SUPPORT Services Totals:	4,750,814.00	1,200,000.00
DIRECT SERVICES TOTAL:	\$ 25,007,113.00	

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
1 AIDS Pharmaceutical Assistance	560810000	3,084.10	
2 Health Insurance Services	560820000	207,151.61	0.00
3 Medical Case Management	560870000	5,414,520.00	0.00
4 Mental Health Therapy/Counseling	560880000	51,237.00	12,333.00
5 Oral Health Care	560890000	2,894,445.00	400,169.50
6 Outpatient/Ambulatory Health Svcs	560901000	8,093,884.64	0.00
7 Substance Abuse - Outpatient	560891000	4,401.00	0.00
CORE Services Totals:		17,121,128.25	412,502.50
Support Services			
8 Emergency Financial Assistance	560894000	0.00	
9 Food Bank	560860000	1,540,894.00	1,000,000.00
10 Medical Transportation	560840000	153,894.90	
11 Other Professional Services	560850000	87,581.00	
12 Outreach Services	560860000	114,924.88	
13 Substance Abuse - Residential	560903000	1,053,590.00	0.00
SUPPORT Services Total:		3,850,884.78	1,000,000.00
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 21,051,990.61	84.19%

Total Core Allocation	17,886,549.00
Target at least 80% core service allocation	17,142,850.40
Current Difference (Short) / Over	\$ 738,658.60

Formula Expenditure %	95.52%
5608710000 Recipient Administration	1,937,858.51
5608800000 Quality Management	620,491.00
Grant Unexpended Balance	FY 2022 Award 2,343,185.38
	Carryover 2,654,944.50
Total Grant Expenditures & %	\$ 23,610,441.12 82.53%

Core medical % against Total Direct Service Allocation (Not including CIO):	83.84%	Within Limit
Quality Management % of Total Award (Not including CIO):	2.62%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):	16.00%	Within Limit

Core medical % against Total Direct Service Expenditures (Not including CIO):	85.07%	Within Limit
Quality Management % of Total Award (Not including CIO):	2.53%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):	7.80%	Within Limit

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Minority AIDS Initiative Expenditure Report (End of Year Summary)

RYAN WHITE PART A GRANT AWARD (Grant#: BURW3201)
 EARMARK ALLOCATION AND EXPENDITURE RECONCILIATION SCHEDULE YR32
 MINORITY AIDS INITIATIVE (MAI) FUNDING
 Per Resolution #S: R-1162-21, R-246-20, R-247-20 & R-817-19

PROJECT #:	AWARD AMOUNTS	ACTIVITIES
Grant Award Amount MAI	1,058,460.00	MAI
Grant Award Amount FY20 MAI	1,623,771.00	FY MAI
Carryover Award FY21 MAI	1,212,670.00	MAI_CARRYOVER
Total Award	\$ 3,925,921.00	

CONTRACT ALLOCATIONS		
DIRECT SERVICES:	Allocations	Carryover Allocations
Core Medical Services		
1 AIDS Pharmaceutical Assistance		
2 Health Insurance Services		
3 Medical Case Management	803,620.00	
4 Mental Health Therapy/Counseling	18,900.00	
5 Oral Health Care	1,368,681.00	
6 Outpatient/Ambulatory Health Svcs	8,098.00	2,287,569.00
7 Substance Abuse - Outpatient		
Support Services		
8 Emergency Financial Assistance	0.00	
9 Food Bank	7,628.00	
10 Medical Transportation		
11 Other Professional Services	39,216.00	
12 Outreach Services		
13 Substance Abuse - Residential		47,444.00
DIRECT SERVICES TOTAL:	\$ 2,335,043.00	2,335,043.00

CURRENT CONTRACT EXPENDITURES			
DIRECT SERVICES:	Account	Expenditures	Carryover Expenditures
Core Medical Services			
1 AIDS Pharmaceutical Assistance	560870000		
2 Health Insurance Services	560820000		
3 Medical Case Management	560870000	616,302.85	
4 Mental Health Therapy/Counseling	560880000	1,007.50	
5 Oral Health Care	560890000		
6 Outpatient/Ambulatory Health Svcs	560891000	850,366.80	
7 Substance Abuse - Outpatient	560891000	570.00	1,278,247.15
Support Services			
8 Emergency Financial Assistance	560894000	0.00	
9 Food Bank	560860000		
10 Medical Transportation	560840000	5,647.59	
11 Other Professional Services	560850000		
12 Outreach Services	560860000	36,498.00	
13 Substance Abuse - Residential	560903000		42,145.50
TOTAL EXPENDITURES DIRECT SVCS & %:		\$ 1,320,392.74	56.55%

Total Core Allocation	2,287,569.00
Target at least 60% core service allocation	1,898,034.40
Current Difference (Short) / Over	\$ 418,564.60

5608710000 Recipient Administration	211,670.40
5608800000 Quality Management	106,883.00
Grant Unexpended Balance	FY 2022 Award 1,074,304.86
	Carryover 1,212,670.00
Total Grant Expenditures & % (Including CIO):	\$ 1,638,948.14 41.75%

Core medical % against Total Direct Service Allocation (Not including CIO):	97.97%	Within Limit
Quality Management % of Total Award (Not including CIO):	3.84%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):	16.00%	Within Limit

Core medical % against Total Direct Service Expenditures (Not including CIO):	96.81%	Within Limit
Quality Management % of Total Award (Not including CIO):	3.84%	Within Limit
OMB-GC Administrative % of Total Award (Cannot include CIO):	7.80%	Within Limit

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Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

11. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient communicated clearly to the Partnership on expenditure changes related to the Part A/MAI sweeps/reallocation process, please explain your concern and suggest a solution to the problem.*

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 12. The Recipient responded to inquiries, requests, and problem-solving needs from the Partnership, including those related to the Partnership's Needs Assessment (Priority Setting and Resource Allocations) in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

13. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient responded to inquiries, requests, and problem-solving needs from the Partnership, including those related to the Partnership's Needs Assessment (Priority Setting and Resource Allocations) in a timely manner, please explain your concern and suggest a solution to the problem.*

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 14. Based on Needs Assessment data, HIV/AIDS services funded by Part A/MAI were directed toward the demographic population(s) of greatest need.

- Strongly agree, Disagree, Agree, Strongly disagree, Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

15. For a rating of "Disagree" or "Strongly Disagree" to the statement: Based on Needs Assessment data, HIV/AIDS services funded by Part A/MAI were directed toward the demographic population(s) of greatest need, please explain your concern and suggest a solution to the problem.

Empty text box for response to question 15.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 16. Based on Needs Assessment data, HIV/AIDS services funded by Part A/MAI were directed toward the geographic area(s) of greatest need.

- Strongly agree, Disagree, Agree, Strongly disagree, Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

17. For a rating of "Disagree" or "Strongly Disagree" to the statement: *Based on Needs Assessment data, HIV/AIDS services funded by Part A/MAI were directed toward the geographic area(s) of greatest need*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 18. The Recipient's staff was courteous and respectful.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

19. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient's staff was courteous and respectful*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

* 20. Behavioral Science Research Corp. (BSR), the Recipient's HIV planning council staff support contractor, responded to inquiries, requests, and problem-solving needs from the Partnership.

- Strongly agree, Disagree, Agree, Strongly disagree, Neither agree nor disagree

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

21. For a rating of "Disagree" or "Strongly Disagree" to the statement: Behavioral Science Research Corp. (BSR), the Recipient's HIV planning council staff support contractor, responded to inquiries, requests, and problem-solving needs from the Partnership, please explain your concern and suggest a solution to the problem.

Empty text box for response to question 21.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (P)

22. OPTIONAL: Additional comments/suggestions regarding the Recipient, BSR, and/or other matters.

Empty text box for optional comments to question 22.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

Ryan White Program Part A/MAI Subrecipient Survey

REVIEW VERSION FOR SPC MEMBERS

The Assessment of the Recipient Administrative Mechanism (AAM) is a Health Resources and Services Administration (HRSA)-mandated evaluation, and a major activity of the Miami-Dade HIV/AIDS Partnership Strategic Planning Committee.

This AAM survey covers the activities of the Ryan White Program grant Recipient: The Miami-Dade County Office of Management and Budget-Grants Coordination, during the Ryan White Program (RWP) *Fiscal Year FY 2023-2024: March 1, 2023-February 29, 2024.*

All Ryan White Program Part A/MAI-funded subrecipients must complete this survey, no later than May 31, 2024.

A separate survey will be distributed to Miami-Dade HIV/AIDS Partnership members addressing these issues and other concerns. If you represent both a subrecipient AND are a Partnership member, you are asked to complete two surveys.

Responses are tallied and reported in aggregate form without identifying information.

Thank you!

* 1. Please enter your Organization's Name

Organization

* 2. Please enter the First and Last Name and Title of the primary person completing this survey. (This is required for tracking responses and will not be included in the final report.)

You will have the option in Statement #3 to include additional people who are helping to complete the survey.

First and last name of
primary person
completing this survey

Title of primary person
completing this survey

How many years have
you been with your
organization?

3. OPTIONAL: Please enter the First and Last Name(s) and Title(s) of additional people who are helping to complete the survey.

First and last name of additional person completing survey (1)

Title of additional person completing survey (1)

How many years have you been with your organization (1)?

First and last name of additional person completing survey (2)

Title of additional person completing survey (2)

How many years have you been with your organization (2)?



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 4. The Miami-Dade County Office of Management and Budget-Grants Coordination (“the Recipient”) conducted a fair contract negotiation process with our organization.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

5. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Miami-Dade County Office of Management and Budget-Grants Coordination ("the Recipient") conducted a fair contract negotiation process with our organization, please explain your concern and suggest a solution to the problem.*



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 6. The Recipient sent award notifications/letters to our organization in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

7. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient sent award notifications/letters to our organization in a timely manner, please explain your concern and suggest a solution to the problem.*



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 8. The Recipient executed our organization’s contract in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

9. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient executed our organization’s contract in a timely manner*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 10. Please indicate the date of your FY 2023-2024 contract execution.

11. For contact execution later than March 15, 2023, please provide details explaining the delay(s).



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 12. There were no significant differences between billed versus reimbursed amounts for our organization that were not discussed prior to any disallowance.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

13. For a rating of "Disagree" or "Strongly Disagree" to the statement: *There were no significant differences between billed versus reimbursed amounts for our organization that were not discussed prior to any disallowance*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 14. The Recipient contacted our organization to review utilization and expenditures that were not on target.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

15. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient contacted our organization to review utilization and expenditures that were not on target*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 16. The Recipient reviewed our organization’s service utilization and reimbursement requests submissions in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

17. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient reviewed our organization’s service utilization and reimbursement requests submissions in a timely manner*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 18. The Recipient provided payment to our organization within 30 days of submission of complete and accurate invoices.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

19. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient provided payment to our organization within 30 days of submission of complete and accurate invoices*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 20. The Recipient clearly explained any holds or disallowances on reimbursement requests.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

21. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient clearly explained any holds or disallowances on reimbursement requests*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 22. When/if our organization requested programmatic and/or fiscal technical assistance or training, it was provided in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

23. For a rating of "Disagree" or "Strongly Disagree" to the statement: *When/if our organization requested programmatic and/or fiscal technical assistance or training, it was provided in a timely manner*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 24. The Recipient provided our organization with a clear explanation of Ryan White Program reporting requirements (i.e., Ryan White HIV/AIDS Program Services Report (RSR), Annual Progress Report, client eligibility screening, etc.).

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

25. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient provided our organization with a clear explanation of Ryan White Program reporting requirements (i.e., Ryan White HIV/AIDS Program Services Report (RSR), Annual Progress Report, client eligibility screening, etc.), please explain your concern and suggest a solution to the problem.*



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 26. Communication between the Recipient and our organization has been timely.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

27. For a rating of "Disagree" or "Strongly Disagree" to the statement: *Communication between the Recipient and our organization has been timely*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 28. Communication between the Recipient and our organization has been effective.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

29. For a rating of "Disagree" or "Strongly Disagree" to the statement: *Communication between the Recipient and our organization has been effective*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 30. The Recipient informed our organization of reallocation processes (sweeps) to identify unmet needs or service gaps, and the requirements of a spending plan in order to adjust our organization's budget during the contract year.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

31. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient informed our organization of reallocation processes (sweeps) to identify unmet needs or service gaps, and the requirements of a spending plan in order to adjust our organization's budget during the contract year*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 32. The Recipient kept our organization well informed of Miami-Dade HIV/AIDS Partnership decisions that impact Ryan White Program subrecipients (e.g., approval of or changes to service definitions, notice of Prescription Drug Formulary changes, updates to Allowable Medical Conditions, changes to billable services, etc.).

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

33. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient kept our organization well informed of Miami-Dade HIV/AIDS Partnership decisions that impact Ryan White Program subrecipients (e.g., approval of or changes to service definitions, notice of Prescription Drug Formulary changes, updates to Allowable Medical Conditions, changes to billable services, etc.), please explain your concern and suggest a solution to the problem.*

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 34. When contract non-compliance issues were raised, the Recipient provided adequate time for remediation specific to the issue.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

35. For a rating of "Disagree" or "Strongly Disagree" to the statement: *When contract non-compliance issues were raised, the Recipient provided adequate time for remediation specific to the issue, please explain your concern and suggest a solution to the problem.*

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 36. In response to our requests, the Recipient provided guidance and clarification to our organization for any program-related document, reporting requirement, or other requested items, in a timely manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

37. For a rating of "Disagree" or "Strongly Disagree" to the statement: *In response to our requests, the Recipient provided guidance and clarification to our organization for any program-related document, reporting requirement, or other requested items, in a timely manner, please explain your concern and suggest a solution to the problem.*

[Empty text box for explanation]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 38. The Recipient responded adequately to inquiries, requests, and problem-solving needs from our organization.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

39. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient responded adequately to inquiries, requests, and problem-solving needs from our organization*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 40. The Recipient's staff was courteous and respectful.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

41. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Recipient's staff was courteous and respectful*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 42. Behavioral Science Research Corp. (BSR), the Recipient’s Ryan White Program Clinical Quality Management contractor, responded adequately to inquiries, requests, and problem-solving from our organization.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

43. For a rating of "Disagree" or "Strongly Disagree" to the statement: *Behavioral Science Research Corp. (BSR), the Recipient’s Ryan White Program Clinical Quality Management contractor, responded adequately to inquiries, requests, and problem-solving from our organization*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 44. The Groupware Technologies, LLC (GTL) Provide® Enterprise Miami (PE Miami) client data management system is reliable.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

45. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The Groupware Technologies, LLC (GTL) Provide® Enterprise Miami (PE Miami) client data management system is reliable*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 46. The PE Miami client database system is easy to use.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable.

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

47. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The PE Miami client database system is easy to use*, please explain your concern and suggest a solution to the problem.

[Empty text box for response]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 48. The PE Miami client database system generates organization-specific data in an efficient and user-friendly manner.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

49. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The PE Miami client database system generates organization-specific data in an efficient and user-friendly manner*, please explain your concern and suggest a solution to the problem.

[Empty text box for explanation and solution]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

* 50. The PE Miami client database system vendor, Groupware Technologies, responds promptly and adequately to inquiries, data requests, and system trouble-shooting.

- Strongly agree
- Disagree
- Agree
- Strongly disagree
- Neither agree nor disagree
- Not applicable

Comments: Strengths, weaknesses & suggestions (optional)

[Empty text box for comments]



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

51. For a rating of "Disagree" or "Strongly Disagree" to the statement: *The PE Miami client database system vendor, Groupware Technologies, responds promptly and adequately to inquiries, data requests, and system trouble-shooting*, please explain your concern and suggest a solution to the problem.



Fiscal Year 2023-2024 Assessment of the Ryan White Program Recipient (S)

52. OPTIONAL: Additional comments/suggestions regarding the Recipient, BSR, PE Miami, Groupware Technologies, and/or other matters.

Assessment of the Recipient Administrative Mechanism 2024 Action Plan

Introduction

This Action Plan was developed by the Strategic Planning Committee with input from the Community Coalition Committee.

The Plan will serve as a tool to track process improvements based on Assessment of the Recipient Administrative Mechanism (AAM) Survey results, specifically negative ratings, general comments, and suggestions for improvements.

The plan will be monitored and updated by the Strategic Planning Committee.

Updates will be posted on www.aidsnet.org.

PE Miami

Provide Enterprise® by Groupware Technologies (PE Miami), the Ryan White Program client database system

Survey Responses

1. Disagree rating 31% / n=5: The PE Miami client database system vendor, Groupware Technologies, responds promptly and adequately to inquiries, data requests, and system troubleshooting.
2. Disagree rating 6% / n=1: The PE Miami client database system is reliable.
3. Disagree rating 6% / n=1: The PE Miami client database system is easy to use.
4. Comment: PE Miami is cumbersome and difficult to navigate.
5. Comment: Most users only received one day of training on the PE Miami database system.
5. Comment: Database is slow and some ADAP and ACA insurance enrollments do not update.

Actions

Create a PE Miami Review Team

Action Steps	Leader(s)	Start Date	End Date	Status	Notes
Determine lead staff for the Review Team.					
Define the composition of the Review Team.					Recipient, BSR staff, medical case managers, contract managers, and other database super users and end users.

Provide additional training on PE Miami

Action Steps	Leader(s)	Start Date	End Date	Status	Notes
Evaluate existing views and reports in PE Miami.					
Identify training needs.					
Develop and enhance PE Miami training based on evaluation of existing views and reports.					
Develop peer-to-peer training opportunities.					

Expenditure Reports to the Partnership

Survey Responses

1. Strongly Disagree rating 5% / n=1: The Recipient communicated clearly to the Partnership on expenditure changes related to the Part A/MAI sweeps/reallocation process.
2. Comment: Well presented, maybe address areas of low utilization and discuss solutions before sweeps.
3. Comment: Would be interesting to see challenges.
4. Comment: It would be better to track utilization of funds and discuss before sweeps are announced.

Actions

Create a Top-Line Summary Report

Action Steps	Leader(s)	Start Date	End Date	Status	Notes
Create a monthly Top-Line Summary (TLS) Report	Partnership Staff	August 2024	Ongoing	May 2024: TLS Report is produced for each Partnership meeting	
Refine the TLS Report to highlight category-specific issues regarding under- and over-utilization and challenges.	Recipient / BSR Staff				
Refine the TLS Report to highlight specific items relevant to Sweeps.	Partnership Staff				
Provide a separate utilization report each month, including challenges.	Recipient	August 2024	Ongoing		Under-utilization in some services is likely a result of the Ryan White Part A Program funds being used as the payor of last resort; that will also be noted on the Top Line Summary Report.
Encourage open discussions at meetings to find solutions to challenges highlighted in the TLS Report and the utilization report.	Partnership Chair / Staff				

Member Engagement

Survey Responses

Comment: Provide language and guidance to engage everyone

Actions

Establish New Meeting Protocols

Action Steps	Leader(s)	Start Date	End Date	Status	Notes
<p>PRE-MEETING Protocols:</p> <p>a. Send a thank you for the RSVP with a calendar invite and offer to have a phone call in preparation for the meeting.</p> <p>b. Send a reminder two days prior to the meeting (on Friday for Monday meetings).</p> <p>c. Sending a reminder the day of the meeting.</p>	Partnership Staff	May 2024	Ongoing		Community Coalition feedback: <i>Send a calendar invite to members and everyone who RSVPs .</i>
<p>MEETING Protocol (Agendas):</p> <p>a. Print definitions of common meeting terminology on the back of agendas.</p>	Partnership Staff / Chairs	May 2024	Ongoing	May 2024: Agendas have been updated with terminology.	
<p>MEETING Protocols (Housekeeping):</p> <p>b. Acknowledge that meetings can be fast-paced and confusing and encourage everyone to ask questions if anything is unclear.</p> <p>c. Stress the importance of active participation and encourage members and guests to speak up about their concerns and to help with problem-solving.</p>	Partnership Staff / Chairs	May 2024	Ongoing	May 2024: Reference to terminology, the pace of meetings, and the importance of participation is announced during Housekeeping.	Community Coalition feedback: <i>Members stressed the importance of slowing down presentations and reporting to make sure everyone is following and understanding the materials.</i>

Survey Responses

Comment: Provide language and guidance to engage everyone

Actions

Establish New Meeting Protocols

Action Steps	Leader(s)	Start Date	End Date	Status	Notes
<p>POST-MEETING Protocol: a. Offer a post-meeting debriefing session.</p>	Partnership Chair / Staff				<p>Include in Housekeeping and announce again at the end of the meeting.</p> <p>Community Coalition feedback: <i>Members agreed this would be helpful since some people may not feel comfortable speaking up during a meeting.</i></p>
<p>POST-MEETING Protocol: b. Create a meeting evaluation / general feedback form and include a link (on agendas?)</p>	Partnership Staff			CCR to review draft in May 2024.	<p>Community Coalition feedback: <i>Combine the meeting evaluation and general feedback into one survey. An online survey would be sufficient; particularly considering the environmental impacts of not printing so much paper. Some of the questions can be formatted with check boxes; some with open text.</i></p>