

THE BOARD OF SUPERVISORS OF THE COUNTY OF STANISLAUS
ACTION AGENDA SUMMARY

DEPT: Community Services Agency

BOARD AGENDA # *B-4

Urgent

Routine

AGENDA DATE December 8, 2015

CEO Concurs with Recommendation YES NO

4/5 Vote Required YES NO

(Information Attached)

SUBJECT:

Approval of Agreements with Sierra Vista Child and Family Services for the Provision of Medi-Cal Beneficiaries Renewal Assistance Services

STAFF RECOMMENDATIONS:

1. Approve an agreement for the provision of Medi-Cal Beneficiaries Renewal Assistance Services with Sierra Vista Child and Family Services, a California Non-Profit Corporation, as a result of a Request for Proposals process for such services.
2. Authorize the Community Services Director, or her designee, to sign the agreements, and any amendments up to \$75,000 each, with Sierra Vista Child and Family Services to provide Medi-Cal Beneficiaries Renewal Assistance Services.

FISCAL IMPACT:

The term of the proposed agreement with Sierra Vista Child and Family Services is January 1, 2016 through December 31, 2016. The following contract maximum will apply:

(Continued on Page 2)

BOARD ACTION AS FOLLOWS:

No. 2015-598

On motion of Supervisor Chiesa, Seconded by Supervisor O'Brien

and approved by the following vote,

Ayes: Supervisors: O'Brien, Chiesa, Monteith, DeMartini, and Chairman Withrow

Noes: Supervisors: None

Excused or Absent: Supervisors: None

Abstaining: Supervisor: None

1) Approved as recommended

2) Denied

3) Approved as amended

4) Other:

MOTION:

ATTEST:


CHRISTINE FERRARO TALLMAN, Clerk

File No.

FISCAL IMPACT: (Continued)

Medi-Cal Beneficiaries Renewal Assistance Services Awardee	Fiscal Year 2015-2016	Fiscal Year 2016-2017	Total Contract Maximum Amount
Sierra Vista Child and Family Services	\$120,206	\$120,205	\$240,411
Total Proposed Budget Amounts by Fiscal Year	\$120,206	\$120,205	\$240,411

The Community Services Agency included total funding of \$120,206 in the 2015-2016 Adopted Final Budget for the first six months of the agreement. Appropriations and estimated revenue for the remaining six months of the agreement will be included in the Agency’s future budget submissions. State and Federal funding reimburses counties 100% of the costs associated with Medi-Cal Beneficiaries Renewal Assistance Services.

There is no cost to the General Fund associated with these agreements.

DISCUSSION:

On February 5, 2015, the Department of Health Care Services (DHCS) issued a memo notifying Counties of a Medi-Cal Renewal Assistance Grant (Senate Bill 18) opportunity. These funds are to assist current Medi-Cal beneficiaries with renewing their coverage starting January 1, 2016. In order to receive the funding, counties are required to partner with one or more Community Based Organizations (CBOs) and disperse at least 90% of the Medi-Cal Renewal Assistance allocation. Health Care Reform and the Affordable Care Act (ACA) made it possible for thousands of Stanislaus County residents to become newly eligible for and enroll in the Medi-Cal Program. However, new mandates within the ACA brought about significant changes to the Medi-Cal renewal process and forms. These changes not only affect the newly eligible Medi-Cal group, but also affect the thousands that were enrolled in Medi-Cal prior to the ACA. In partnership with CBOs, CSA will deliver much needed assistance with understanding and completing the new Medi-Cal renewal process and forms, thereby increasing the likelihood that Medi-Cal families (new and old) will retain their Medi-Cal health coverage year after year.

Approval of Agreements with Sierra Vista Child and Family Services for the Provision of Medi-Cal Beneficiaries Renewal Assistance Services
Page 3

Due to Stanislaus County Community Services Agency (CSA) participation in Assembly Bill 82, Section 71 Outreach and Enrollment efforts, CSA was eligible to receive the Senate Bill 18 (SB 18) renewal funding. On February 11, 2015, CSA submitted a letter to DHCS confirming their intention to participate in the renewal assistance effort.

On March 18, 2015, CSA was notified they had been chosen as a recipient for the DHCS Medi-Cal Renewal Assistance Allocation authorized by SB 18. On June 9, 2015, CSA received Board of Supervisor's approval to accept the grant award and to issue a Request for Proposal (RFP) to seek proposals from community based organizations that will be used to assist in the Medi-Cal Renewal strategies. The intended use for the Department of Health Care Services Medi-Cal Renewal Assistance allocation is to provide Medi-Cal Beneficiaries assistance with completing the renewal process, thereby retaining Medi-Cal eligibility and healthcare coverage in years 2015 and 2016.

In an effort to serve more Stanislaus County Medi-Cal beneficiaries in renewing their Medi-Cal coverage, CSA elected to conduct a Request for Proposals to solicit proposals from our Community Based Organizations and utilize their resources in expanding our Medi-Cal Renewal Assistance efforts.

The following are some of the services the contracted vendor will provide:

- Create outreach materials to all Medi-Cal Renewal beneficiaries, with an emphasize on the harder to reach Spanish Mono-lingual and Aged/Blind/Disabled populations;
- Develop outreach materials that help the beneficiaries understand the new complexities of the Medi-Cal Renewal process;
- Educate Medi-Cal beneficiaries on how to complete the Medi-Cal renewal process;
- Assist with the completion of the Medi-Cal Renewal packet, including identifying/overcoming barriers to providing the needed documentation and retrieving required verification.

The selected vendor is expected to contact approximately 1,400 Medi-Cal beneficiaries every month who were non-responsive to the initial mailing of the Medi-Cal Renewal and 50% of the contacted Medi-Cal beneficiaries will successfully complete their renewal packets.

Approval of Agreements with Sierra Vista Child and Family Services for the Provision of Medi-Cal Beneficiaries Renewal Assistance Services
Page 4

On July 8, 2015, a Request for Proposals (RFP) was issued by the General Services Agency (GSA) on behalf of CSA, and sent electronically to 358 vendors, 16 of which downloaded the RFP. A non-mandatory pre-proposal conference was held on July 22, 2015 and four vendors were in attendance. The RFP closed on August 7, 2015 and GSA received a complete response from Sierra Vista Child and Family Services and a response from JRivera Associates, Inc. that excluded the financials. Sierra Vista Child and Family Services met the minimum qualifications set forth in Phase I of the Evaluation Phase, which included a financial review. JRivera Associates, Inc. failed the financial review section; therefore, did not proceed. A committee of three (3) evaluators was selected to further evaluate the proposals. The Evaluation Committee was comprised of representatives from the County’s Community Services Agency and Alliance Worknet.

The Evaluation Committee completed Phase II and Phase III, which consisted of a review and evaluation of the proposer’s qualification proposal and proposed budget. The RFP proposal was evaluated using the following criteria with the corresponding total number of available points in each category:

PHASE II	MAXIMUM POINTS
Overall Qualifications	10
Experience with Target Population	25
Understanding of County Programs	15
Implementation Plan	10
PHASE III	
Language Offered other than English/Spanish	5
Renewal and Outcome Strategy	25
Proposed Budget and Budget Narrative	10
TOTAL POSSIBLE WEIGHT OR POINTS:	100

Approval of Agreements with Sierra Vista Child and Family Services for the Provision of Medi-Cal Beneficiaries Renewal Assistance Services
Page 5

The scores of each member of the Evaluation Committee were averaged to determine the actual Phase II and Phase III scores. A contract was awarded to the one vendor because the proposal met the criteria set forth in the RFP and the proposal met the needs of the Department and County, with price and all other factors considered. The final average total score is as follows:

Phase II and Phase III	Total Points Available	Sierra Vista Child and Family Services
Total Average Points	100	83

* Needed 75 of 100 points to pass

On September 1, 2015 GSA issued a Notice of Intent to Award letter to the one proposer. No letter of protest was received during the five-day protest period of the RFP process.

POLICY ISSUES:

Approval of these requests supports the Board of Supervisors' priorities of A Healthy Community, Effective Partnerships and Efficient Delivery of Public Services by meeting a community need for services that improves the health and well-being of families in our community.

STAFFING IMPACT:

Existing Community Services Agency staff is available to support these Medi-Cal Beneficiaries Renewal Assistance Services at current service levels. In the future, should the service level demand increase, the Agency will analyze available options and return to the Board of Supervisors for consideration of any necessary staffing changes.

CONTACT PERSON:

Kathryn M. Harwell, Director

(209) 558 - 2500

**COUNTY OF STANISLAUS
COMMUNITY SERVICES AGENCY
AGREEMENT TO PROVIDE
MEDI-CAL RENEWAL ASSISTANCE SERVICES
JANUARY 1, 2016 THROUGH DECEMBER 31, 2016**

This AGREEMENT FOR INDEPENDENT CONTRACTOR SERVICES (the "Agreement") is made and entered into by and between the COUNTY OF STANISLAUS ("County") and **SIERRA VISTA CHILD AND FAMILY SERVICES** ("Contractor"), a California non-profit corporation, and entered into as of the later of January 1, 2016, or the execution of the Agreement by both parties (the "Effective Date").

RECITALS

WHEREAS, the County has a need for Medi-Cal beneficiaries renewal assistance services; and

WHEREAS, the Contractor is specially trained, experienced and competent to perform and has agreed to provide such services; and

NOW, THEREFORE, in consideration of the mutual promises, covenants, terms and conditions hereinafter contained, the parties hereby agree as follows:

TERMS AND CONDITIONS

1. SCOPE OF WORK

- 1.1 The Contractor shall furnish to the County, upon execution of this Agreement or receipt of the County's written authorization to proceed, those services and work set forth in EXHIBIT A, attached hereto and, by this reference, made a part hereof.
- 1.2 All documents, drawings and written work product prepared or produced by the Contractor under this Agreement, including without limitation electronic data files, are the property of the Contractor; provided, however, the County shall have the right to reproduce, publish and use all such work, or any part thereof, in any manner and for any purpose whatsoever and to authorize others to do so. If any such work is copyrightable, the Contractor may copyright the same, except that, as to any work which is copyrighted by the Contractor, the County reserves a royalty-free, non-exclusive, and irrevocable license to reproduce, publish, and use such work, or any part thereof, and to authorize others to do so.
- 1.3 Services and work provided by the Contractor at the County's request under this Agreement shall be performed in a timely manner consistent with the requirements and standards established by applicable federal, state and County laws, ordinances, regulations and resolutions.

2. CONSIDERATION

- 2.1 County shall pay Contractor as set forth in EXHIBIT A.

- 2.2 Except as expressly provided in EXHIBIT A of this Agreement, Contractor shall not be entitled to nor receive from County any additional consideration, compensation, salary, wages or other type of remuneration for services rendered under this Agreement. Specifically, Contractor shall not be entitled by virtue of this Agreement to consideration in the form of overtime, health insurance benefits, retirement benefits, disability retirement benefits, sick leave, vacation time, paid holidays or other paid leaves of absence of any type or kind whatsoever.
- 2.3 County shall not withhold any Federal or State income taxes or Social Security tax from any payments made by County to Contractor under the terms and conditions of this Agreement. Payment of all taxes and other assessments on such sums is the sole responsibility of Contractor. County has no responsibility or liability for payment of Contractor's taxes or assessments.
- 2.4 Pursuant to Penal Code section 484b and to Business and Professions Code section 7108.5, the Contractor must apply all funds and progress payments received by the Contractor from the County for payment of services, labor, materials or equipment to pay for such services, labor, materials or equipment. Pursuant to Civil Code section 1479, the Contractor shall direct or otherwise manifest the Contractor's intention and desire that payments made by the Contractor to subcontractors, suppliers and materialmen shall be applied to retire and extinguish the debts or obligations resulting from the performance of this Agreement.
- 2.5 Payment of all services provided in accordance with the provisions of this Agreement is contingent upon the availability of County, state and federal funds.

3. TERM

- 3.1 The term of this Agreement shall be from the Effective Date **through December 31, 2016**, or until completion of the agreed upon services unless sooner terminated as provided below or by some other method provided for in this Agreement.
- 3.2 Should either party default in the performance of this Agreement or materially breach any of its provisions, the other party, at that party's option, may terminate this Agreement by giving written notification to the other party.
- 3.3 This Agreement shall terminate automatically on the occurrence of (a) bankruptcy or insolvency of either party, (b) sale of Contractor's business, (c) cancellation of insurance required under the terms of this Agreement, and (d) if, for any reason, Contractor ceases to be licensed or otherwise authorized to do business in the State of California, and the Contractor fails to remedy such defect or defects within thirty (30) days of receipt of notice of such defect or defects.
- 3.4 The County may terminate this Agreement upon thirty (30) days prior written notice to the Contractor. Termination of this Agreement shall not affect the County's obligation to pay for all fees earned and reasonable costs necessarily incurred by the Contractor as provided in section 2 herein, subject to any applicable setoffs.
- 3.5 Notwithstanding any other provisions of this Agreement, County may terminate the Agreement immediately:
 - A. Upon receipt of evidence of probable unsafe and/or hazardous practice in the provision of services; or,

- B. Upon loss of any license(s) required for lawful operation of Contractor's business; or,
- C. Upon an unauthorized decrease in the required insurance in force; or,
- D. Upon failure to make payroll payments; or,
- E. Failure to remit payroll deductions in a timely manner to the appropriate State and Federal government; or,
- F. Upon failure to substantially meet other financial obligations; or,
- G. Upon service or a writ of attachment by creditors of Contractor.

4. WORK SCHEDULE

Contractor is obligated to perform in a timely manner those services and work identified in EXHIBIT A. It is understood by Contractor that the performance of these services and work shall require the Contractor to perform the services and work in conformance with the schedule set forth in EXHIBIT A, if any, and, if there is no schedule, the hours and times for completion of said services and work are to be set by the Contractor; provided, however, that such schedule is subject to review by and concurrence of the County.

5. REQUIRED LICENSES, CERTIFICATES AND PERMITS

Any licenses, certificates or permits required by the federal, state, county or municipal governments for Contractor to provide the services and work described in EXHIBIT A must be procured by Contractor and be valid at the time Contractor enters into this Agreement. Further, during the term of this Agreement, Contractor must maintain such licenses, certificates and permits in full force and effect. Licenses, certificates and permits may include but are not limited to driver's licenses, professional licenses or certificates and business licenses. Such licenses, certificates and permits shall be procured and maintained in force by Contractor at no expense to the County.

6. OFFICE SPACE, SUPPLIES, EQUIPMENT, ETC.

Unless otherwise provided in this Agreement, Contractor shall provide such office space, supplies, equipment, vehicles, reference materials and telephone service as is necessary for Contractor to provide the services under this Agreement. County is not obligated to reimburse or pay Contractor for any expense or cost incurred by Contractor in procuring or maintaining such items. Responsibility for the costs and expenses incurred by Contractor in providing and maintaining such items is the sole responsibility and obligation of Contractor.

7. INSURANCE

7.1 Contractor shall take out, and maintain during the life of this Agreement, insurance policies with coverage at least as broad as follows:

7.1.1 General Liability Insurance: Comprehensive general liability insurance covering bodily injury, personal injury, property damage, products and completed operations with limits of no less than One Million Dollars (\$1,000,000) per incident or occurrence. If Commercial General Liability

Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to any act or omission by Contractor under this Agreement or the general aggregate limit shall be twice the required occurrence limit.

- 7.1.2 Automobile Liability Insurance: If the Contractor or the Contractor's officers, employees, agents, representatives or subcontractors utilize a motor vehicle in performing any of the work or services under this Agreement, owned/non-owned automobile liability insurance providing combined single limits covering bodily injury, property damage and transportation related pollution liability with limits of no less than One Million Dollars (\$1,000,000) per incident or occurrence.
- 7.1.3 Workers' Compensation Insurance: Workers' Compensation insurance as required by the California Labor Code. In signing this Agreement, the Contractor certifies under section 1861 of the Labor Code that the Contractor is aware of the provisions of section 3700 of the Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and that the Contractor shall comply with such provisions before commencing the performance of the work of this Agreement.
- 7.2 Any deductibles, self-insured retentions or named insured must be declared in writing and approved by County. At the option of the County, either: (a) the insurer shall reduce or eliminate such deductibles, self-insured retentions or named insured, or (b) the Contractor shall provide a bond, cash, letter of credit, guaranty or other security satisfactory to the County guaranteeing payment of the self-insured retention or deductible and payment of any and all costs, losses, related investigations, claim administration and defense expenses. The County, in its sole discretion, may waive the requirement to reduce or eliminate deductibles or self-insured retentions, in which case, the Contractor agrees that it shall be responsible for and pay any self-insured retention or deductible and shall pay any and all costs, losses, related investigations, claim administration and defense expenses related to or arising out of the Contractor's defense and indemnification obligations as set forth in this Agreement.
- 7.3 The Contractor shall provide a specific endorsement to all required insurance policies, except Workers' Compensation insurance and Professional Liability insurance, if any, naming the County and its officers, officials and employees as additional named insured regarding: (a) liability arising from or in connection with the performance or omission to perform any term or condition of this Agreement by or on behalf of the Contractor, including the insured's general supervision of the Contractor; (b) services, products and completed operations of the Contractor; (c) premises owned, occupied or used by the Contractor; and (d) automobiles owned, leased, hired or borrowed by the Contractor. For Workers' Compensation insurance, the insurance carrier shall agree to waive all rights of subrogation against the County and its officers, officials and employees for losses arising from the performance of or the omission to perform any term or condition of this Agreement by the Contractor.
- 7.4 The Contractor's insurance coverage shall be primary insurance regarding the County and County's officers, officials and employees. Any insurance or self-insurance maintained by the County or County's officers, officials and employees shall be excess of the Contractor's insurance and shall not contribute with Contractor's insurance.

- 7.5 Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the County or its officers, officials, employees or volunteers.
- 7.6 The Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
- 7.7 Each insurance policy required by this section shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party except after thirty (30) days prior written notice has been given to County. The Contractor shall promptly notify, or cause the insurance carrier to promptly notify, the County of any change in the insurance policy or policies required under this Agreement, including, without limitation, any reduction in coverage or in limits of the required policy or policies.
- 7.8 Insurance shall be placed with California admitted insurers (licensed to do business in California) with a current rating by Best's Key Rating Guide acceptable to the County; provided, however, that if no California admitted insurance company provides the required insurance, it is acceptable to provide the required insurance through a United States domiciled carrier that meets the required Best's rating and that is listed on the current List of Eligible Surplus Line Insurers maintained by the California Department of Insurance. A Best's rating of at least A-VII shall be acceptable to the County; lesser ratings must be approved in writing by the County.
- 7.9 Contractor shall require that all of its subcontractors are subject to the insurance and indemnity requirements stated herein, or shall include all subcontractors as additional named insured under its insurance policies.
- 7.10 At least ten (10) days prior to the date the Contractor begins performance of its obligations under this Agreement, Contractor shall furnish County with certificates of insurance and with original endorsements effecting coverage required by this Agreement, including, without limitation, those effecting coverage for subcontractors of the Contractor. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements shall be received and, in County's sole and absolute discretion, approved by County. County reserves the right to require complete copies of all required insurance policies and endorsements, at any time.
- 7.11 The limits of insurance described herein shall not limit the liability of the Contractor and Contractor's officers, employees, agents, representatives or subcontractors.
- 7.12 If any insurance coverage required hereunder is provided on a "claims made" rather than "occurrence" form, Contractor agrees to maintain the required insurance coverage for a period of three (3) years after the expiration of this Agreement (hereinafter "post agreement coverage") and any extensions thereof. Contractor may maintain the required post agreement coverage by renewal of purchase of prior acts or tail coverage. This provision is contingent upon post agreement coverage being both available and reasonably affordable in relation to the coverage provided during the term of this Agreement. For purposes of interpreting this requirement, a cost not exceeding 100% of the last annual policy premium during the term of this Agreement in order to purchase prior acts or tail coverage for post agreement coverage shall be deemed to be reasonable.

8. DEFENSE AND INDEMNIFICATION

- 8.1 To the fullest extent permitted by law, Contractor shall indemnify, hold harmless and defend the County and its agents, officers and employees from and against all claims, damages, losses, judgments, liabilities, expenses and other costs, including litigation costs and attorneys' fees, arising out of, resulting from, or in connection with the performance of this Agreement by the Contractor or Contractor's officers, employees, agents, representatives or subcontractors and resulting in or attributable to personal injury, death, or damage or destruction to tangible or intangible property, including the loss of use. Notwithstanding the foregoing, Contractor's obligation to indemnify the County and its agents, officers and employees for any judgment, decree or arbitration award shall extend only to the percentage of negligence or responsibility of the Contractor in contributing to such claim, damage, loss and expense.
- 8.2 Contractor's obligation to defend, indemnify and hold the County and its agents, officers and employees harmless under the provisions of this paragraph is not limited to or restricted by any requirement in this Agreement for Contractor to procure and maintain a policy of insurance.
- 8.3 To the fullest extent permitted by law, the County shall indemnify, hold harmless and defend the Contractor and its officers, employees, agents, representatives or subcontractors from and against all claims, damages, losses, judgments, liabilities, expenses and other costs, including litigation costs and attorney's fees, arising out of or resulting from the negligence or wrongful acts of County and its officers or employees.

9. STATUS OF CONTRACTOR

- 9.1 All acts of Contractor and its officers, employees, agents, representatives, subcontractors and all others acting on behalf of Contractor relating to the performance of this Agreement, shall be performed as independent contractors and not as agents, officers or employees of County. Contractor, by virtue of this Agreement, has no authority to bind or incur any obligation on behalf of County. Except as expressly provided in EXHIBIT A, Contractor has no authority or responsibility to exercise any rights or power vested in the County. No agent, officer or employee of the County is to be considered an employee of Contractor. It is understood by both Contractor and County that this Agreement shall not be construed or considered under any circumstances to create an employer-employee relationship or a joint venture.
- 9.2 At all times during the term of this Agreement, the Contractor and its officers, employees, agents, representatives or subcontractors are, and shall represent and conduct themselves as, independent contractors and not employees of County.
- 9.3 Contractor shall determine the method, details and means of performing the work and services to be provided by Contractor under this Agreement. Contractor shall be responsible to County only for the requirements and results specified in this Agreement and, except as expressly provided in this Agreement, shall not be subjected to County's control with respect to the physical action or activities of Contractor in fulfillment of this Agreement. Contractor has control over the manner and means of performing the services under this Agreement. Contractor is permitted to provide services to others during the same period services are provided to County under this Agreement. If necessary, Contractor has the responsibility for employing other persons or firms to assist Contractor in fulfilling the terms and obligations under this Agreement.

- 9.4 If in the performance of this Agreement any third persons are employed by Contractor, such persons shall be entirely and exclusively under the direction, supervision and control of Contractor. All terms of employment including hours, wages, working conditions, discipline, hiring and discharging or any other term of employment or requirements of law shall be determined by the Contractor.
- 9.5 It is understood and agreed that as an independent contractor and not an employee of County, the Contractor and the Contractor's officers, employees, agents, representatives or subcontractors do not have any entitlement as a County employee, and do not have the right to act on behalf of the County in any capacity whatsoever as an agent, or to bind the County to any obligation whatsoever.
- 9.6 It is further understood and agreed that Contractor must issue W-2 forms or other forms as required by law for income and employment tax purposes for all of Contractor's assigned personnel under the terms and conditions of this Agreement.
- 9.7 As an independent contractor, Contractor hereby indemnifies and holds County harmless from any and all claims that may be made against County based upon any contention by any third party that an employer-employee relationship exists by reason of this Agreement.

10. RECORDS AND AUDITS

- 10.1 Contractor shall prepare and maintain all writings, documents, and records prepared or compiled in connection with the performance of this Agreement for a minimum of five (5) years from the termination or completion of this Agreement or until such records and their supporting documentation are released due to closure of Federal/State audit, whichever is longer. This includes any handwriting, typewriting, printing, photostatic, photographing, and every other means of recording upon any tangible thing, any form of communication or representation including letters, words, pictures, sounds, or symbols or any combination thereof.
- 10.2 Records shall be destroyed in accordance with California Department of Social Services (CDSS) Manual of Policy and Procedures (MPP) Division 23, Section 350.
- 10.3 Any authorized representative of County shall have access to any writings as described in section 10.1 above for the purposes of making audit, evaluation, examination, excerpts, and transcripts during the period such records are to be maintained by Contractor. Further, County has the right at all reasonable times to audit, inspect, or otherwise evaluate the work performed or being performed under this Agreement.
- 10.4 County shall have the right to audit all invoices and records of the Contractor related to this Agreement as required by State law. County may appoint an independent public accountant.
- 10.5 Contractor agrees that its financial records shall contain itemized records of all costs and be available for inspection in Stanislaus County within three (3) working days of the request by the County, state or federal agencies.
- 10.6 Monitoring by County may be accomplished by the following non-exclusive means: field reviews, audit claims, monthly review of records.

- 10.7 Contractor shall be responsible for the procurement and performance of a fiscal and compliance audit for each Contractor's fiscal years included in term of this Agreement when Contractor reimbursement exceeds \$45,000 per fiscal year. Further, entities receiving in excess of \$750,000 in Federal funds annually must comply with the Single Audit Act of 1984, PL 98-502 and the Single Audit Amendments of 1996, P.L. 104-156. All audits must be performed in accordance with Government Audit standards as set forth in the Guidelines for Financial and Compliance Audits for Federally Assisted Programs, Activities, and Functions, and the provisions of Title 2, Code of Federal Regulation (CFR) Part 200 as this applies to the auditing of states, local governments, institutions of higher education and non-profit.
- 10.8 The annual audit requirement in section 10.7 is replaced with a biennial audit covering the most recent fiscal year if all of the following apply:
- A. The total County Agreement expenditures, from all funding sources including but not limited to federal, state and local funds, during the fiscal year, are less than \$100,000
 - B. The Contractor is in compliance with all other Agreement requirements
 - C. An audit was performed on one of the preceding two (2) years in accordance with Government Auditing Standards and a copy of the report and any management letter has been submitted to County
 - 1) The auditor's opinion on the financial statement and the schedule of federal awards (if applicable) were unqualified
 - 2) There were no deficiencies in internal control over financial reporting that were identified as material weaknesses under the requirements of Government Auditing Standards
 - 3) None of the state or federal programs had audit findings in the preceding year that were classified as:
 - a. Material weaknesses in the internal control over compliance
 - b. Noncompliance with the provisions of laws, regulations, contracts, or grant agreements that had a material effect on the program
 - c. Known or likely questioned costs
 - D. The audit must be conducted in accordance with Government Auditing Standards and the statements must be prepared in conformity with generally accepted accounting principles.
- 10.9 Contractor shall include in all fiscal audit reports an opinion which indicates whether program expenditures are allowable pursuant to the provisions of 45 CFR, Part 74, and all applicable State and Federal guidelines, policies and procedures.
- 10.10 Expenses incurred by Contractor to provide for the performance of an audit to satisfy said requirements are an allowable Agreement cost. Contractor is responsible for ensuring that the appropriate portion of audit costs are included with its total executed Agreement funds.

10.11 Contractor is responsible for submitting to County an audit report, prepared in accordance with section 10, within one hundred twenty (120) days of the end of the Contractor's fiscal year.

11. CONFIDENTIALITY

Contractor shall comply and require its officers and employees to comply with the provisions of Section 10850 of the Welfare and Institutions Code (WIC) and Division 19 of the California Department of Social Services Manual of Policies and Procedures to assure that:

- 11.1 Any and all information pertaining to the administration of public social services, for which grants in aid are received shall be confidential and will not be open to examination for any purpose not directly connected with the administration of public social services.
- 11.2 No person shall publish or disclose, or use or permit, or cause to be published, disclosed or used, any confidential information pertaining to an applicant or recipient.
- 11.3 Contractor shall inform all of its employees, agents, subcontractors and partners of the above provision and that any person knowingly and intentionally violating the provisions of said state law is guilty of misdemeanor.
- 11.4 Contractor shall comply with the privacy and security safeguards agreement titled Medi-Cal Data Privacy and Security Agreement between the California Department of Health Care Services and the County of Stanislaus, Community Services Agency located at <http://www.stanworks.com/other-services/medi-cal-data-privacy-and-security-agreement.pdf>.

12. NON-DISCRIMINATION

- 12.1 During the performance of this Agreement, Contractor and its officers, employees, agents, representatives or subcontractors shall not unlawfully discriminate in violation of any Federal, State or local law, rule or regulation against any employee, applicant for employment or person receiving services under this Agreement because of race, religious creed, color, national origin, ancestry, physical or mental disability, medical condition, genetic information, pregnancy related condition, marital status, gender/sex, sexual orientation, gender identity, gender expression, age (over 40), political affiliation or belief, or military and veteran status. Contractor and its officers, employees, agents, representatives or subcontractors shall comply with all applicable Federal, State and local laws and regulations related to non-discrimination and equal opportunity, including without limitation the County's non-discrimination policy; the Fair Employment and Housing Act (Government Code sections 12900 et seq.); California Labor Code sections 1101, 1102 and 1102.1; the Federal Civil Rights Act of 1964 (P.L. 88-352), as amended; and all applicable regulations promulgated in the California Code of Regulations or the Code of Federal.
- 12.2 Contractor shall include the non-discrimination and compliance provisions of this clause in all subcontracts to perform work under this Agreement.
- 12.3 Contractor shall have a formal process by which recipients of service shall have the opportunity to express and have considered their views, grievances, and complaints regarding Contractor's delivery of services.

13. ASSIGNMENT

- 13.1 This is an agreement for the services of Contractor. County has relied upon the skills, knowledge, experience and training of Contractor and the Contractor's firm, associates and employees as an inducement to enter into this Agreement. Contractor shall not assign or subcontract this Agreement without the express written consent of County. Further, Contractor shall not assign any monies due or to become due under this Agreement without the prior written consent of County.
- 13.2 Any working agreements, memoranda of understanding, or subcontracts let as a result of this Agreement shall adhere to the terms contained in this Agreement and shall be submitted to County prior to their commencement.

14. WAIVER OF DEFAULT

Waiver of any default by either party to this Agreement shall not be deemed to be waiver of any subsequent default. Waiver or breach of any provision of this Agreement shall not be deemed to be a waiver of any other or subsequent breach, and shall not be construed to be a modification of the terms of this Agreement unless this Agreement is modified as provided below.

15. NOTICE

Any notice, communication, amendment, addition or deletion to this Agreement, including change of address of either party during the term of this Agreement, which Contractor or County shall be required or may desire to make shall be in writing and may be personally served or, alternatively, sent by prepaid first class mail to the respective parties as follows:

To County: County of Stanislaus
Community Services Agency
Attention: Contracts Manager
PO Box 42
Modesto, CA 95353

To Contractor: Sierra Vista Child & Family Services
Attention: Judy Kindle, Executive Director
100 Poplar Avenue
Modesto, CA 95354

16. CONFLICTS

Contractor agrees that it has no interest and shall not acquire any interest direct or indirect which would conflict in any manner or degree with the performance of the work and services under this Agreement.

17. SEVERABILITY

If any portion of this Agreement or application thereof to any person or circumstance shall be declared invalid by a court of competent jurisdiction or if it is found in contravention of any federal, state or county statute, ordinance or regulation the remaining provisions of this Agreement or the application thereof shall not be invalidated thereby and shall remain in full force and effect to the extent that the provisions of this Agreement are severable.

18. AMENDMENT

This Agreement may be modified, amended, changed, added to or subtracted from by the mutual consent of the parties hereto if such amendment or change is in written form and executed with the same formalities as this Agreement and attached to the original Agreement to maintain continuity.

19. ADVICE OF ATTORNEY

Each party warrants and represents that in executing this Agreement, it has received independent legal advice from its attorneys or the opportunity to seek such advice.

20. CONSTRUCTION

Headings or captions to the provisions of this Agreement are solely for the convenience of the parties, are not part of this Agreement, and shall not be used to interpret or determine the validity of this Agreement. Any ambiguity in this Agreement shall not be construed against the drafter, but rather the terms and provisions hereof shall be given a reasonable interpretation as if both parties had in fact drafted this Agreement.

21. GOVERNING LAW AND VENUE

This Agreement shall be deemed to be made under, and shall be governed by and construed in accordance with, the laws of the State of California. Any action brought to enforce the terms or provisions of this Agreement shall have venue in the County of Stanislaus, State of California.

22. GENERAL ACCOUNTABILITY

22.1 In the event of an audit exception or exceptions, the Contractor shall be responsible for the deficiency resulting from the Contractor's non-compliance with program requirements.

22.2 In the event of any State hearings, cash grant award or lawsuit award resulting from Contractor's failure to perform as required by this Agreement, reimbursement shall be made to the damaged party by Contractor.

22.3 Any expenses the County incurs as a result of the Contractor's failure to perform as required by this Agreement are subject to recoupment by County through any form of legal action including withholding from payment for the services rendered under this Agreement.

23. CODE OF ETHICS

Contractor shall uphold the following Code of Ethics:

- Professional Conduct: Employees of Contractor shall abide by all applicable laws, regulations, policies and procedures in the delivery of all services. Professional staff of Contractor shall also abide by specific codes of ethics prescribed by the professional organizations which set standards for their profession.

- **Quality of Service:** Employees of Contractor shall promote the goals of the program, which includes enhancement of participant self-esteem, by providing quality service which demonstrates knowledge of the respect for participant needs.
- **Respect and Courtesy:** Employees of Contractor shall conduct all activities with respect and courtesy for participants.
- **Propriety:** Employees of Contractor shall not make use of their position or relationship with clients for personal gain.
- **Positive Representation:** Employees of Contractor shall not behave in any manner that will bring discredit to his/her professional status and reputation or to the program.

24. **COPYRIGHT ACCESS**

County, CDSS, and the United States Department of Health and Human Services shall have a royalty free nonexclusive and irrevocable license to publish, translate, or use, now or hereafter, all material developed under this Agreement including those covered by copyright.

25. **STATE ENERGY CONSERVATION PLAN**

Contractor agrees to recognize the mandatory standards and policies relating to energy efficiency in the State Energy Conservation Plan Title 24, California Administrative Code, as required by the U. S. Energy, Policy and Conservation Act (P. L. 94165).

26. **CONVICTION OF CRIME**

- 26.1 Contractor shall immediately notify County concerning the arrest and/or subsequent conviction, for other than minor traffic offenses, of any paid employee and/or volunteer staff assigned to provide services under this Agreement, when such information becomes known to Contractor.
- 26.2 Contractor agrees not to knowingly employ any person convicted of any crime involving abuse, neglect, violence, or sexual conduct involving or perpetrated upon a minor, or an adult person or who has been convicted of any felony.
- 26.3 Contractor shall establish a procedure acceptable to County to ensure that all employees or agents performing services under this Agreement report child abuse or neglect to a child protective agency as defined in Penal Code Section 11165.1 through 11165.6. Contractor shall require each employee, volunteer, consultant, subcontractor or agency to sign a statement that he or she knows of the reporting requirements as defined in Penal Code Section 11166(a) and shall comply with the provisions of the code section.

27. **MATCHING FUNDS**

These funds are not available for matching with federal, state or local funds for this or any other Agreement unless certified by County.

28. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION-LOWER TIER COVERED TRANSACTIONS

28.1 County and Contractor recognize that Federal assistance funds shall be used under the terms of this Agreement. For purposes of this section, Contractor shall be referred to as the "prospective recipient".

28.2 This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

- A. The prospective recipient of Federal assistance funds certifies by entering this Agreement, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- B. The prospective recipient of funds agrees by entering this Agreement, that it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the Federal department or agency with which this transaction originated.
- C. Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this Agreement.
- D. The prospective recipient shall provide immediate written notice to County if at any time prospective recipient learns that its certification in section 28 of this Agreement was erroneous when submitted or has become erroneous by reason of changed circumstances.
- E. The prospective recipient further agrees that by entering this Agreement, it shall include a clause identical to section 28 of this Agreement and titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions", in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
- F. The certification in section 28 of this Agreement is a material representation of fact upon which reliance was placed by County when this transaction was entered into.

29. COMPLIANCE WITH FALSE CLAIMS ACT

29.1 Contractor shall notify County immediately upon discovery of any employee of Contractor, any subcontractor, agent or other persons providing services, on behalf of Contractor who are placed on the State's Medi-Cal Suspended and Ineligible Provider List. Any employee of Contractor, any subcontractor, agent or other persons providing services on behalf of Contractor, who is placed on the Medi-Cal Suspended and Ineligible Provider List shall not provide services to County under this Agreement. This list is available on the Internet at www.medi-cal.ca.gov.

29.2 Pursuant to Section 6032 of the Deficit Reduction Act of 2005, Contractor shall communicate to its employees, subcontractors, agents and other persons providing services on behalf of Contractor the policies and procedures related to the Federal and State False Claims Act. Contractor shall be in compliance with the False Health Care Claims Policy approved by the Stanislaus County Board of Supervisors on May 8, 2007, located at <http://www.co.stanislaus.ca.us/BOS/Agenda/2007/20070508/B07> and that it and its employees, subcontractors, agents and other persons providing services on behalf of Contractor shall adhere to these policies and procedures.

30. ENTIRE AGREEMENT

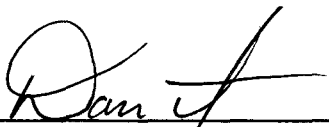
30.1 This Agreement supersedes any and all other agreements, either oral or in writing, between any of the parties herein with respect to the subject matter hereof and contains all the agreements between the parties with respect to such matter. Each party acknowledges that no representations, inducements, promises or agreements, oral or otherwise, have been made by any party, or anyone acting on behalf of any party, which is not embodied herein, and that no other agreement, statement or promise not contained in this Agreement shall be valid or binding.

30.2 This Agreement may be executed in counterparts, each of which shall be deemed to be an original but all of which, taken together, shall constitute one and the same agreement.

//

This Agreement has been signed by the parties or their duly authorized representatives to be effective as of the date referenced on the first page.

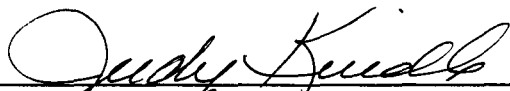
COUNTY OF STANISLAUS

By: 
FOR Kathryn M. Harwell

Title: ASSISTANT Director

Dated: 12/08/2015

**SIERRA VISTA
CHILD & FAMILY SERVICES**

By: 
Judy Kindle

Title: Executive Director

Dated: 11/23/15

**APPROVED AS TO FORM:
COUNTY COUNSEL
JOHN P. DOERING**

By: 

Title: Deputy County Counsel

Dated: 11/18/15

COUNTY OF STANISLAUS

Approved per BOS Item #: 2015-598

Dated: 12/8/15

**SIERRA VISTA CHILD AND FAMILY SERVICES
AGREEMENT TO PROVIDE
MEDI-CAL ENROLLMENT ASSISTANCE SERVICES
JANUARY 1, 2016 THROUGH DECEMBER 31, 2016**

Request for Proposal/Qualifications/Information # 15-29-CB issued by Stanislaus County GSA Purchasing Division; the Contractor's/Consultant's responding proposal; Information for Proposers; General Conditions, as well as any plans, specifications, addenda, and any documents particularly required or provided (as may be applicable), all of which are incorporated herein by reference and made a part hereof (collectively, the "RFP"), together with this Agreement, comprise the contract and all services provided hereunder shall be performed in accordance therewith. In the event there is a conflict between the terms and conditions set forth in the RFP, then in such case, the terms and conditions of this Agreement shall prevail.

California Code of Regulations, Title 22, Division 3, Subdivision 1, Chapter 1, § 50004 Medi-Cal Program Administration (c) states the county welfare department in each county shall be the agency responsible for local administration of the Medi-Cal program under the direction of the Department. (Authority cited: Sections 10725 and 14124.5, Welfare and Institutions Code. Reference: Sections 10722, 10743, 11050, 14001.1 and 14100, Welfare and Institutions Code which designates County Social Services departments as being the only entity that can determine eligibility for the Medi-Cal Program, the County is looking for the CBO to gather information that will assist CSA with determining eligibility and assist CSA with annual renewals for the Medi-Cal program.

I. SCOPE OF WORK:

Contractor shall assist current Stanislaus County residents who are Medi-Cal beneficiaries in renewing their coverage

A. JOINT RESPONSIBILITIES:

Both parties shall have the following joint responsibilities:

1. Contractor shall provide County, in writing, the name and address of the person who has primary responsibility for liaison and coordination of Agreement activities. County shall provide a similar liaison person to Contractor.
2. Participate in monthly meetings or as mutually agreed upon;
3. Develop Medi-Cal Renewal outreach mailer;
4. Continually work together on process for sharing customer information

B. CONTRACTOR RESPONSIBILITIES:

In providing services under this Agreement, at all times Contractor shall make a good faith and diligent effort to effectuate enrollment of the targeted population in Medi-Cal.

The Contractor shall provide the following services:

1. Develop outreach materials that help the targeted population understand the new complexities of the Medi-Cal Renewal process
2. Provide outreach to all Medi-Cal Renewal participants/beneficiaries, with an emphasis on the harder to reach Spanish Mono-lingual and Aged/Blind/Disabled populations by providing the following services
 - a. Send out Medi-Cal Renewal Assistance mailers to the individuals on the County provided Mailer List within five (5) business days of receiving the list from the County. The Mailer List will include individuals that must meet the requirements for renewal within the following sixty (60) days.
 - b. Call Medi-Cal individuals on the Phone Call List within 12 days or receiving the list from the County. The Phone Call List will include individuals that have not completed a renewal in the prior month.
 - c. Contractor shall provide the outcome of their outreach efforts to the individuals on the Mailer and Phone Call List and return to County by the 12th of the current month and again on the 5th of the following month
 - d. Notify County when mailers are undeliverable based on the address provided by County
 - e. Notify County if County provided phone number is incorrect.
3. Educate Medi-Cal beneficiaries on how to complete the Medi-Cal renewal process.
4. Assist with completion of the Medi-Cal Renewal packet, including identifying and overcoming barriers to completing the packet.

C. EXPECTED OUTCOMES MATRIX

PERFORMANCE MATRIX		
Outcomes:	Activities:	Outputs:
Increased renewal response rate (return rate) to ensure continuity of care for Medi-Cal beneficiaries	<ul style="list-style-type: none"> * Mailing "reminders" monthly to those Medi-Cal beneficiaries who have a renewal due. * Reminder call to beneficiaries to those who have not returned the required Renewal paperwork. * Contacting the beneficiaries with any other means. * Offer assistance in completing the packet and/or retrieving needed verifications required. * Teaching beneficiaries how to complete the renewal process * Conducting Home Visit (upon request) for those households in need of additional assistance. 	<ol style="list-style-type: none"> 1) Approx. 1,400 MC Beneficiaries are non-responsive to the initial mailing of the MC Renewal Packet monthly. These folks will be contacted through outreach efforts. 2) 50% of the above households will successfully complete their Medi-Cal renewal as a result of these outreach efforts.

D. COUNTY RESPONSIBILITIES:

County shall provide the following:

1. Medi-Cal renewal and/or eligibility training to the Contractor to the extent needed for the provision of the services in this Agreement.
2. Two monthly lists of individuals to the Contractor,
 - a. Mailer List - A monthly list of Medi-Cal Beneficiaries that should receive Medi-Cal Renewal Mailers by the 1st business day of the month sixty (60) days prior to the Medi-Cal Renewal due date.
 - b. Phone Call List - A monthly list of Medi-Cal Beneficiaries that should receive a phone call notification of their Medi-Cal Renewal requirements.

II. COMPENSATION:

Contractor shall be compensated for the services provided under this Agreement as follows:

A. Costs:

1. The maximum amount of this Agreement for the period January 1, 2016, through December 31, 2016, shall not exceed \$240,411.
2. This is a cost reimbursement Agreement. The costs attendant to the provision of services are described in EXHIBIT B which is hereby incorporated by reference and made a part hereof.
3. Contractor shall not expend any funds provided pursuant to this Agreement except as expressly authorized in EXHIBIT B, or as the budget is thereafter amended or obligated.

B. Contractor shall make no charge to the recipient and shall collect no share of cost.

C. This Agreement shall be effective January 1, 2016, through December 31, 2016.

D. Contractor agrees that the costs to be charged to County for contracted services for the term of this Agreement includes all allowable Contractor costs, both indirect and direct, relative to this Agreement.

E. Costs must comply with Federal grant reform and uniform guidance in Title 2, Code of Federal Regulation (CFR) Part 200 – Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards. The changes included in Title 2, CFR 200 supersede and streamline requirements from several Office of Management and Budget (OMB) Circulars. The circulars included are A-21, A-50, A-87, A-102, A-110, A-122 and A-133. All equipment purchased by Contractor must be depreciated in accordance with 45 CFR 95.705. All equipment, materials, supplies or property of any kind purchased from funds reimbursed or furnished by County under the terms of this Agreement shall be fully consumed or aged out in the course of the Agreement/program. County reserves the right to physically reclaim any/all such

Agreement/program. County reserves the right to physically reclaim any/all such property at the conclusion of the Agreement in accordance with 45 Code of Federal Regulations, Part 74, Administration of Grants.

F. County shall not be required to purchase any definite amount of services nor does County guarantee to Contractor any minimum amount of funds or hours.

G. Invoices:

1. For services provided in the months of January 2016 through April 2016, Contractor shall submit invoices, in a County specified format, within twenty (20) days following the end of service month. **Invoices for service months of May and June 2016 are as follows:**

May 2016 is due June 3, 2016
June 2016 is due June 10, 2016

2. For services provided in the months of July 2016 through December 2016, Contractor shall submit invoices, in a County specified format, within twenty (20) days following the end of service month.

Invoice requirements are subject to change and the Contractor shall be notified in writing.

3. Invoices shall be submitted to:

Stanislaus County Community Services Agency
Attention: Accounts Payable Supervisor, E2A
P.O. Box 42
Modesto, CA 95353-0042
(209) 558-2217

4. Supporting documentation shall accompany each invoice: copies of employee time studies/time cards documenting actual time dedicated to these Agreement services, supporting payroll and fringe benefit journals, copies of paid receipts/invoices of all Contractor operational costs billed to this Agreement. In addition, Contractor shall submit a monthly list of all participants in the contracted activities and include their full name, social security number and case number (if available).

H. Payments:

1. If the conditions set forth in this Agreement are met County shall pay, on or before the thirtieth (30th) day after receipt of the invoice, the sum of money claimed by the approved invoice, (less any credit due County for adjustments of prior invoices). If the conditions are not met, County shall pay when the necessary processing is completed.
2. County shall not pay for unauthorized services rendered by Contractor or for the claimed services which County monitoring shows have not been provided as authorized.

3. Contractor shall be paid in accordance with the Stanislaus County Travel Policy, located at <http://www.stancounty.com/auditor/internal-audit-division.shtm>, which allows for the claim of mileage during the course of business. The County established mileage rate, maintained by the Stanislaus County Auditor-Controller's Office, may be adjusted annually based on the Internal Revenue Service (IRS) stated rate for that year. Incremental IRS rate increases are not automatic.

NOTE: Contractor must have out of county travel approved by County thirty (30) days prior to the event. The request should be submitted to CSA Program Manager via email.

4. County retains the right to withhold payment on disputed claims.

I. Reporting

1. Contractor shall provide a quarterly progress report, as described in EXHIBIT C, by the 10th of the following month.
 - a. Contractor shall submit a completed "O & E Quarterly Narrative" as described in instructions on EXHIBIT C. EXHIBIT C, O & E Progress Report, is hereby incorporated by this reference.
 - b. Contractor shall submit a completed "O & E Monthly Progress Report Template". EXHIBIT D, O & E Monthly Progress Report Template, is hereby incorporated by this reference.
 - c. Contractor shall submit a completed "O & E Monthly Progress Report". EXHIBIT E, O & E Monthly Progress Report (data submission), is hereby incorporated by this reference.

**SIERRA VISTA CHILD AND FAMILY SERVICES
 AGREEMENT TO PROVIDE
 MEDI-CAL RENEWAL ASSISTANCE SERVICES
 JANUARY 1, 2016 THROUGH DECEMBER 31, 2016
 AGREEMENT BUDGET**

<u>BUDGET CATEGORY</u>	<u>TOTAL</u>
Personnel Services	
Salaries	\$142,116
Fringe Benefits (Invoice actual employer paid only)	\$32,687
Total Personnel	\$174,803
Operating Expenses	\$43,772
Indirect (10% of Personnel and Operating Expenses)	\$21,816
TOTAL COSTS	<u>\$240,411</u>

**O&E Quarterly Progress Report
Medi-Cal Renewal Assistance****Vendor Name:** _____ **Quarter:** _____

Instructions: Report the progress your organization achieved during the month and year-to-date (YTD) towards each work plan objective. This report is comprised of a brief narrative (submitted quarterly) and completion of the chart described below for each O&E objective (submitted monthly).

O & E Quarterly Narrative (Submitted Quarterly):

- Describe the activities carried out this reporting period to meet the objectives, as described in your work plan. Briefly describe indicators or benchmarks used and progress to date. If you worked with any community-based organizations (CBOs), please indicate who they are and what did they do for the project.
 - What did you accomplish during this reporting period? Did you use indicators or benchmarks to determine your progress? How many Medi-Cal enrollments resulted from your Medi-Cal O&E efforts?
- Describe any practices or innovative strategies that were successful and can serve as a model for others or that your county can build upon.
- Describe project activities or successes not identified in the work plan that were a spin-off of work plan activities.
- Describe which, if any, proposed activities were not completed.
 - If the activities completed differ from your proposal, what caused these changes? Were activities delayed and if so, why? Will these activities be completed? When and how? Are there any activities you will not be able to complete during the course of your grant?
- Describe any challenges or barriers encountered and proposed solutions.

O & E Monthly Progress Report Template – EXHIBIT D (Submitted Monthly):

- Using the approved work plan as a blueprint, discuss the progress made on each of your objectives. Quantify your progress whenever possible (e.g., number of people enrolled, enrollment percentages, etc.).
- Indicate whether the information provided in this attachment pertains to Outreach, Enrollment, Retention, or any combination of the three, efforts accomplished or attempted during the reporting period.

O & E Monthly Progress Report – EXHIBIT E (Submitted Monthly):

- Provide information for all items that apply to the progress made during the report month.
- Provide year-to-date totals.

**O&E Monthly Progress Report Template
Medi-Cal Renewal Assistance**

Vendor Name:	Reporting Month:
---------------------	-------------------------

Check the appropriate box to identify the O&E objective (you may check one or more box below):

Outreach
 Enrollment
 Retention

Major Deliverables and Activities	Target Population Reached	Materials	Staff Used/ Location	Status	Performance Measures and Data Collection
<i>Include reference to the major outcome objectives indicated in the work plan</i>	<i>Specify target audience</i>	<i>Specify all materials developed, finalized, or distributed (radio/TV/print ads; brochures, flyers, etc.) using allocation funds</i>	<i>Indicate staff responsible and Location of work plan activities</i>	<i>Indicate the completion date. If not completed, indicate the projected completion date. Provide a reason if date is different than on the approved work plan.</i>	<i>Provide achievements, percentages, and numbers for the month that document achievements.</i>

**O&E Monthly Progress Report (data submission)
Medi-Cal Renewal Assistance**

Vendor Name: _____ **Report Month:** _____

Numbers Specific to O&E Activities ONLY

	Current Month	Year-to-date
Amount Billed		
Number of individuals reached by O&E efforts		
Number of individuals assisted with enrollment into Medi-Cal		
Number of approved Medi-Cal applications resulting from Medi-Cal O&E efforts		
Number of beneficiaries assisted with annual eligibility review (AER) and/or Medi-Cal redetermination		
Number of beneficiaries that retained Medi-Cal coverage as a result of the O&E efforts		
Number of CEC's and CIA's used in O&E efforts		
Number of CAAs used in O&E efforts		