

# CONTRACT REQUIREMENTS



# Deliverables/Milestones

8/31/2011

9/15/2011

11/30/2011

12/30/2011\*

3/31/2012\*

6/30/2012\*

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# RPC Deliverables/Milestones

- General Requirements
- Phase One Services
- Phase Two Services
- Required Regional Services

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# General Requirements - RPC

- RFP Section C.3.1.1 (Pp 38-42)
  - Supplier Branding
  - Prevention Message and Sponsorship
  - Service Location
  - **Staff Requirements**
  - **ODMHSAS Trainings/Meetings**
  - **Program Participant Protection**
  - Revision and Change Requests

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# Phase One Services - RPC

- RFP Section C.3.1.2 (Pp 42-45)
  - Regional Needs Assessment
    - **REOW, Needs Assessment, Preliminary Epidemiological Profile**
  - Capacity Building
    - **TTA, MOUs, Community Readiness Assessment, SPF Trainings, Coalition TA, Key Constituents, Other Coalitions**
  - Planning
    - **Strategic Plan, Identify Indicators, Implementation**

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# Phase Two Services - RPC

- RFP Section C.3.1.3 (Pp 45-46)
  - Capacity Building
    - TTA, Community Readiness Assessment, **Additional Trainings**, Relationship Development
  - **Implementation**
    - Evidence-Based Services and Fidelity
  - Evaluation
    - Required Evaluation Efforts, **Detailed Evaluation Plan, NOMs**

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# Required Regional Services - RPC

- RFP Section C.3.1.4 (Pp 46-49)
  - ▣ Prevention Coordination Services
    - **Regional Strategic Plan, Earned Media Outputs, Information Dissemination, Youth Retail Access to Tobacco, Retail Access to Alcohol, 2much2lose**
  - ▣ Training and Technical Assistance Services
    - **TTA, Youth Leadership Development, OPNA**

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# Reporting – RPC

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# Reporting – RPC

- RFP Section C.3.1.3.3.3 (Pg 46)
  - NOMS
    - Reported quarterly
- RFP Section C.3.1.5 (Pp 49-50)
  - Annual Site Visit
  - Prioritized Indicator/Measure
    - Reported quarterly
    - Must be submitted within 30 days of the end of the quarter
  - Final expenditure Report
    - Must be submitted within 60 days of the end of the fiscal year

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# SPF SIG Deliverables/Milestones

- General Requirements
- Phase One Services
- Phase Two Services

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# General Requirements – SPF SIG

- RFP Section C.4.1.1 (Pp 50-54)
  - Supplier Branding
  - Prevention Message and Sponsorship
  - Service Location
  - **Staff Requirements**
  - **ODMHSAS Trainings/Meetings**
  - **Program Participant Protection**
  - Revision and Change Requests

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# Phase One Services – SPF SIG

- RFP Section C.4.1.2.1 (Pp 54-56)
  - Needs Assessment
    - **REOW Needs Assessment, Epidemiological Profile, Identification of SPF SIG site**
  - Capacity Building
    - **TTA, MOU's, Community Readiness Assessment, SPF Trainings, Key Constituents, Coalition TA**
  - Planning
    - **Strategic Plan, SPF SIG Indicator, Implementation**

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# Phase Two Services – SPF SIG

- RFP Section C.4.1.3 (Pp 57-59)
  - ▣ Capacity Building
    - TTA to SPF SIG Coalition, Community Readiness Assessment, On-going Coalition Development, Relationship Development
  - ▣ **Implementation**
    - **Strategic Plan**, Coalition Support, Use of EBP's, Target Area, Fidelity

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# Phase Two Services – SPF SIG

- RFP Section C.4.1.3 (Pp 57-59)
  - Evaluation
    - **Evaluation Plan, CLI Completion, NOM's, Data Collection, Documentation**

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# Reporting – SPF SIG

- RFP Section C.4.1.3.3.4 (Pg 58)
  - NOMS
    - Reported annually
- RFP Section C.4.1.4 (Pp 58-59)
  - Progress Reports
    - Reported quarterly
    - Must be submitted within 15 days of the end of the quarter
  - Other Reports and Forms
    - Must be completed and submitted as requested by the ODMHSAS
  - Maintain Documentation
    - These documents are subject to review by the ODMHSAS

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# Budget

- We submitted a budget with our bid, since we received the bid isn't it already approved?
- Things to remember
  - ▣ Details, Details, Details – Be Specific
  - ▣ Training/Conferences – How does it further your work?
  - ▣ Show calculations
  - ▣ Follow allowable/unallowable documents
  - ▣ Indirect Costs vs. Direct Costs
  - ▣ Some items require prior approval
  - ▣ Required item (RPC and SPF SIG)
    - 2 required OKC meetings for 2 people with 2 overnights
    - Personnel expenses for full-time RPC Director/SPF SIG Coordinator

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# Budget Categories and Details

- RFP Section E.4.6.4.5 (Pp 67-68 and Attachment F)
  - Personnel
  - Fringe Benefits
  - Travel
  - Equipment
  - Supplies
  - Contractual
  - Other
  - Indirect

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# Budget Modification

- RFP Section B.8 (Pg 14)
  - ▣ Budget Modification Form
  - ▣ Revised Budget
  - ▣ Revised Strategic Plan (If Necessary)

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# Budget Modification Form

Oklahoma Department of Mental Health and Substance Abuse Services  
 Prevention Services Division  
 Budget Modification Request- FY 2012 Contract

Agency Name: \_\_\_\_\_ Modification Requested by \_\_\_\_\_

Expenditure Category	Current Approved Budget	Proposed Increase (+)/Decrease (-)	Proposed New Budget
Personnel	\$0.00	\$0.00	\$0.00
Fringe	\$0.00	\$0.00	\$0.00
Travel	\$0.00	\$0.00	\$0.00
Equipment	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$0.00	\$0.00
Contractual	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00
<b>Total Direct Cost</b>	\$0.00	\$0.00	\$0.00
Indirect Cost	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00

Justification:

\_\_\_\_\_  
 Contractor Approval Signature Date

\_\_\_\_\_  
 Programmatic Approval Signature Date

\_\_\_\_\_  
 ODMHSAS Approval Signature Date

Please fax to your designated field representative at 405.522.6784

# Allowable/Unallowable Expenses



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# Allowable/Unallowable Expenses

- RFP Section E.4.6.4.5 (Pg 68 and Attachment D)
  - Allowable
    - Section 34 CFR Subtitle A §80.22 Allowable costs
    - Indirect
    - Direct
  - Unallowable
    - Activities not related to project
    - Meals
    - Property
    - Entertainment
    - Lobbyists/Travel for the purpose of lobbying
    - Fund Raising
    - Project Proposal Development
- Car Rental and Travel

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# Invoicing

- RFP Section B.2 (Pg 13)
  - ▣ The ODMHSAS template must be used
  - ▣ Must be submitted within 30 days of the end of the month
  - ▣ Payment may be withheld or delayed while the ODMHSAS is waiting for requested documentation
  - ▣ Unsupported claims shall be repaid to the ODMHSAS

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# Invoicing

## FY12 Contract - Invoice

Department of Mental Health and Substance Abuse Services  
 Attn: Denotia Davis, Administrative Assistant II  
 Print and Fax signed Invoice to 405.713.2532

<b>Agency Name &amp; Address:</b> Awesome PRC 123 Main St Anytown, OK 73165 Region #		<b>Billing Period:</b> July	
		<b>PO #</b>	549735
		<b>Total Contract</b>	\$150,000.00

	Amount billed for current month	Cumulative amount for FY12	Total amount budgeted for FY12	Amount Left	% Used
<b>Direct Costs</b>					
Personnel	\$ -	\$0.00	\$95,000.00	95,000.00	0.00%
Personnel Fringe	\$ -	\$ -	\$23,750.00	23,750.00	0.00%
Travel	\$ -	\$ -	\$4,050.00	4,050.00	0.00%
Equipment	\$ -	\$ -	\$1,500.00	1,500.00	0.00%
Supplies	\$ -	\$ -	\$1,000.00	1,000.00	0.00%
Contractual	\$ -	\$ -	\$3,255.00	3,255.00	0.00%
Other	\$ -	\$ -	\$2,500.00	2,500.00	0.00%
<b>Total Direct costs</b>	\$ -	\$0.00	\$131,055.00	\$ 131,055.00	0%
Indirect costs (limited to 13% of direct costs)	-	-	\$18,945.00		
<b>Total</b>	-	-	\$150,000.00		

Contractor Approval Signature	Date
Contractor Printed Name	
ODMHSAS Fiscal Approval Signature	Date
ODMHSAS Programmatic Approval Signature	Date

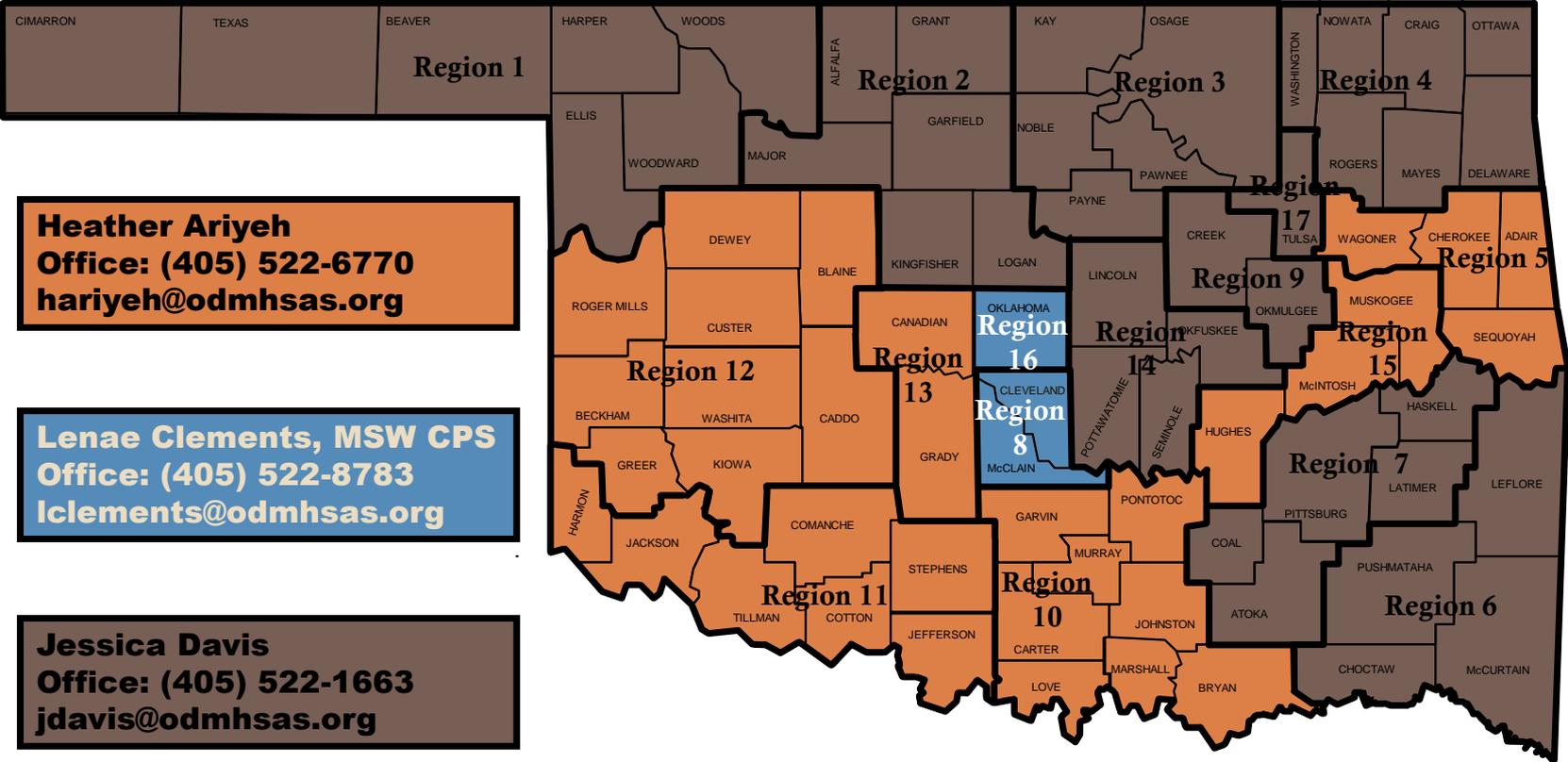
# Site Review

- How often and how many?
  - Conducted annually
  - If at all possible one joint review will be completed for the RPC and SPF SIG contracts
- Who should attend?
  - Required: RPC Director, SPF SIG Coordinator, Fiscal Staff (during financial review)
  - Encouraged: RPC Staff, SPF SIG Staff, Community stakeholders, Agency executives
- What will be covered?
  - Agency Presentation
  - General Contract Services
  - Verification of Services
  - Financial Review
- What's New?
  - Site Review Binder

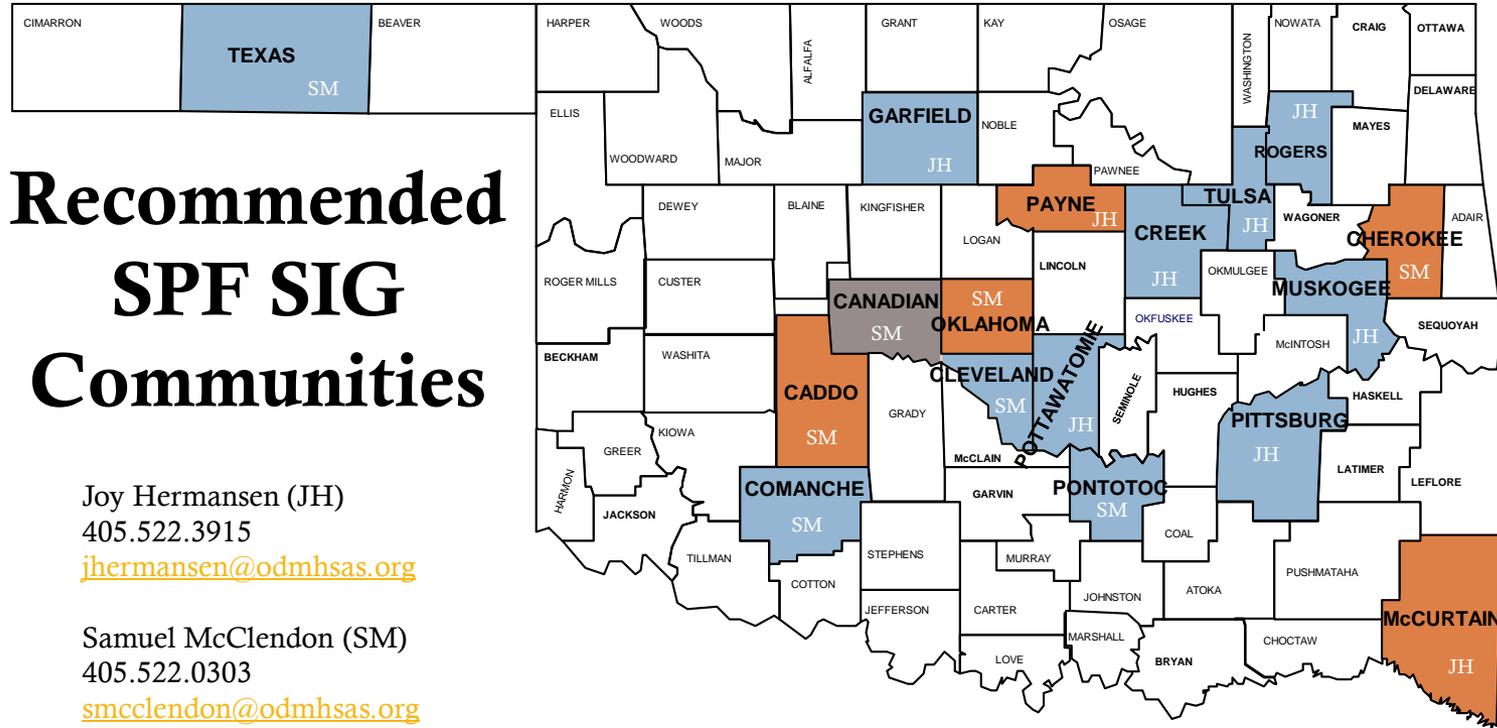
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# RPC Field Representatives



# SPF SIG Field Representatives



## Recommended SPF SIG Communities

Joy Hermansen (JH)  
405.522.3915

[jhermansen@odmhsas.org](mailto:jhermansen@odmhsas.org)

Samuel McClendon (SM)  
405.522.0303

[smcclendon@odmhsas.org](mailto:smcclendon@odmhsas.org)

- Non Medical Use of Prescription Drugs
- Underage Drinking
- Either