

**Performance Review**

<b>Meeting Date:</b> <b>See attached sign-in sheet for meeting participants.</b>	<b>Comments</b>	<b>1st Quarter Review</b>	<b>2nd Quarter Review</b>	<b>3rd Quarter Review</b>	<b>4th Quarter Review &amp; New FY Kick Off</b>
<b>NOTIFICATIONS</b>		x	x	x	x
Notification: cscForce updates/changes (review helpdesk emails or upcoming changes)		x	x	x	x
Notification: Availability of Just Dreams		x	x	x	x
Notification: CBHC Events (Summits, Trainings such as Webinars, EE, cscForce, Social Enterprise, etc.)		x	x	x	x
Notification: Relevant Community Events & Activities (Legislative Summit, Investment Summit, etc.)		x	x	x	x
Notification: Resource Development Opportunities (Co-Funding, Match, Rev Max, other revenue generating options) -- Identify pending application submitted by provider or new funds.		x	x	x	x
Notification: CBHC Funding Opportunities (TA, Match, RFPs)		x	x	x	x
Notification: Review General Terms & Conditions Changes including sponsorship/logo use and updates to 2-1-1.					x
Notification: cscForce Demographic Requirements					x
Notification: Schedule financial review (invoice testing)					x
Notification: Schedule time to conduct cscForce Data Integrity checks for accuracy and timeliness (demographics & outcomes for current fiscal year) to be completed by end of March		x			
Notification: Schedule ASO chart review at the same time of cscForce Data Integrity Check		x			
Notification: August 15th Budget modification deadline			x	x	
<b>REVIEWS</b>		x	x	x	x
Review: ASO Expenditures (if applicable) (Request report from ASO)		x	x	x	x
Review: TCM Billing/Spending (if applicable)		x	x	x	x
Review: CPA Audit Report -- (indirect calculation, reserves, line of credit)					
Review: cscForce data integrity results and determine frequency of data integrity checks				x	
Review: Performance Improvement Process					x

<b>Meeting Date:</b> <b>See attached sign-in sheet for meeting participants.</b>	<b>Comments</b>				<b>4th Quarter Review &amp; New FY Kick Off</b>
		<b>1st Quarter Review</b>	<b>2nd Quarter Review</b>	<b>3rd Quarter Review</b>	
Review: Matrix Reporting Data - Data Trends, waiting lists, <b>services for wait list participants</b> , measurement tools & protocols, outreach & <b>referral development</b> efforts, <b>resources or technical assistance</b> needed, <b>staff training activities</b> . Print cscForce Matrix with Performance Data.		X	X	X	X
Review Lessons Learned					X
Review: Budget Report (Identify projected lapse, variance justifications and opportunities for cost-savings, funding from other sources)		X	X	X	X
<b>DISCUSSION</b>		X	X	X	X
Discussion: New FY Kick Off -- budget review Review CBHC Reporting Requirements					X
Discussion: New FY Kick Off -- Matrix review: Model Fidelity practices, protocols for measurement tools, etc. Review CBHC Reporting Requirements					X
Discussion: Disaster Planning (is a plan in place for service operations, staff (personal) and available resources to assist		X	X		
Discussion: Program Assessment & Rating Tool Results Discussion				X	
Discussion: Organizational Capacity Building Assessment Results/ Action Plan (if applicable)		X	X	X	X
Discussion: Positional changes to next year's budget, matrix, etc.			X		
Discussion: Identify Staff changes (agency level & program level) -- name, position, effective date and impact to capacity to deliver services.		X	X	X	X
Discussion: How do you gain & evaluate feedback from your customers and how do you use it?			X		
Discussion: Service Participant Attrition -- who is dropping out; are they different than those who are staying				X	
Discussion: Status of Next FY Contract (timing, changes, etc.)				X	
Discussion: Plus/Delta -- what is one thing that works well between your project and the CBHC and one thing that can be improved?			X		
Discussion: In our next year of meetings, what should we do more of? Less of? And stick to doing?				X	