

MHSA PROJECT PROPOSAL PROCESS

SUGGESTIONS AND ADDITIONAL
GUIDANCE

March 17, 2009



EXHIBIT 3 – COVER PAGE

- Sign and Date this page
- If Consortium = Yes Describe consortium in proposal (e.g. members, responsibilities, breakdown of consortium costs, etc)
- If Full EHR checked, describe all components in the project description
- If multiple EHR components checked, submit as a combined EHR project



EXHIBIT 3 – COVER PAGE

- Client & Family Empowerment Projects must be submitted as separate project proposals
 - Client/Family Access to Computer Resources
 - Personal Health Record
 - Online Information Resources



EXHIBIT 3 – COVER PAGE

- Other Technological Needs Projects must be submitted as separate project proposals
 - Telemedicine
 - Pilot Projects to monitor programs & services
 - Data Warehousing/Decision Support
 - Imaging/Paper Conversion
 - Other (combine projects in this category into one summary proposal but describe costs separately in Exhibit 3, Section 3.1 Cost Justification)

EXHIBIT 3 – NARRATIVE

Section 1.1 PROJECT OVERVIEW

- Include a description of your agency
 - Number of Service locations
 - Number of employees
 - Types of Services provided
- Describe current IT environment
 - Staffing
 - Project Management experience



EXHIBIT 3 – NARRATIVE

Section 1.1 PROJECT OVERVIEW

- Ensure the project description is consistent with the projects checked on the Cover Page
 - If more than one EHR component project checked, be sure that you describe each in the Project Overview
 - If your project is consistent with an EHR project, don't call it an EDI project



EXHIBIT 3 – NARRATIVE

Section 3.1 COST

- Cost Justification section must include enough information to fully support all categories of project costs
- Tell us what you are requesting, why you need it and be specific
 - Why new equipment is needed (link to project objectives)
 - How many of each item is requested



EXHIBIT 3 – NARRATIVE

Section 3.1 COST

- Verify that costs described in this section are consistent with costs as listed in Exhibit 4 – Budget Summary
- Basic upgrades to IT infrastructure (computers, printers, servers, etc) are specifically prohibited in the MHSA Technological Needs Guidelines



EXHIBIT 3 – NARRATIVE

Section 3.1 COST

- For Contract Services, separate costs by specific project activity and list each separately on Exhibit 4 – Budget Summary
 - Custom Programming
 - Contract Services for Training
 - Consultant Services
 - ASP*, Billing Service, Clearinghouse costs

*Include ASP Contract Costs under “Contract Services” do not itemize these costs as “Software”



APPENDIX A: Project Risk Assessment

- If a risk category does not apply
 - Enter “N/A” in the “Score” column
 - This option has been added on the revised form
 - Do not score any risk category “0” (zero)
 - Verify that the total Risk Score is correct
 - Check the appropriate Project Risk Rating (High, Medium, Low) at the bottom of the form



EXHIBIT 4 – Budget Summary

- Budget Summary form has been revised considerably
- All funds requested should be entered in whole dollars
- A column for Start-up request has been added to Fiscal Year 1
- Verify that your Start-up request does not exceed 20% of total project funding request



EXHIBIT 4 – Budget Summary

- Fiscal Year dates must be entered into each Fiscal Year budget column
 - For example, if Fiscal Year 1 is 2009-2010 then mark the form accordingly
- Form allows for Five (5) Fiscal Years
 - Add additional columns if needed



EXHIBIT 4 – Budget Summary

- One Time Costs and Ongoing Costs are no longer required
 - The far right column is the total of all Fiscal years representing allowable MHSA costs only
- Project Budget must be restricted to the costs of implementing the project to serve Los Angeles County Mental Health clients/family



EXHIBIT 4 – Budget Summary

- Total Costs A
 - This total will reflect your project costs associated with the costs of your project attributable to serving DMH clients/family
- Total Costs B
 - Enter project costs not attributable to serving DMH clients/family and costs attributable to other programs (e.g. Alcohol and Drug Program)



Project Schedule: Appendices C & C-1

- Two Project Schedule Forms Required
 - Appendix C: Summary Project Schedule
 - Appendix C-1: Detail Project Schedule
- Appendix C
 - Include only Summary Tasks & Milestones
 - This schedule is also included in the Quarterly Project Status Report
- Appendix C-1
 - Include Summary Tasks & Milestones and related detail tasks and schedule



Project Schedule: Appendices C & C-1

- All tasks must include the following:
 - Original Start Date
 - Original Completion Date
 - Task Duration
- Project Milestones
 - Original Start Date and Original Completion Date will be the same, with no duration



EXHIBIT 6 – Project Status Report

- Major Milestone Status Chart has been revised to show the following:
 - Original Start Date
 - Original Completion Date
 - Revised Completion Date
 - Actual Completion Date
- Deliverables/Milestone heading changed to Task/Milestone to match Appendix C



General Forms Changes

- All headings on appendices and exhibits have been standardized to include the following:
 - Project Title
 - Contract Agency Name
 - Legal Entity Number
 - Consortium (Y/N)
- Standardization will ensure proper document management



Proposal Review Process

- First Level Review
 - Review Tool Developed
- Factors considered at First Level
 - Completeness of Proposal Package
 - Accuracy of budget
 - Consistency of budget with project description
 - Thoroughness of narrative in Exhibit 3



Proposal Review Process

- CIOB will communicate findings from First Level review in writing
- CIOB may request revised documents
- Review comments will be specific
- Process will be iterative – CIOB will continue to work with each agency until the proposal package is ready for Second Level Review



Proposal Review Process

- Second Level Review
 - Review Tool will be developed
 - Review Teams will be assembled
 - Review Teams will consist of content experts within CIOB
 - Review comments and communication process will be the same as described in Level One
 - Process will be iterative



Questions/Discussion

