

AREA 12 AGENCY ON AGING CONTRACT PERFORMANCE REPORT

SERVICE PROVIDER: _____

FY: **2025-2026** For the Quarter Ending: _____ Standard %: _____ %

If cumulative year-to-date performance falls (below) or above 5% of the year-to-date *Standard Percentage at the end of any quarter, this form must be submitted to A12AA with the fiscal monthly expenditure report for the final month of the quarter. *Standard Percentage equals number of months in quarter (3, 6, 9 or 12) divided by 12

- Only insert titles of programs that are out of compliance
- Document "Contracted Units" and "Actual Units" cumulatively (YTD)
- To determine percentage, divide YTD Actual Units by YTD Contracted Units.

Insert Program Title : EXAMPLE	C-1 Cong	C-2 Hm Delivered	3-B			
Contracted UOS/Meals	12,000					
Quarterly YTD Actual UOS/Meals	8,000					
Percentage-Actual vs. Contracted	66.66%					
Performance Over or (Under) Standard	(8.34)%					

Insert Program Title :	C-1 Cong	C-2 Hm Delivered	3-B			
Contracted UOS/Meals						
Quarterly YTD Actual UOS/Meals						
Percentage-Actual vs. Contracted						
Performance Percentage Over or (Under) Standard						

Quarterly Performance Report

SERVICE PROVIDER: _____

FY: 2021-2022 For the Quarter Ending: _____

Program Name: _____

Explain reasons for under or over performance standard:

Describe plan and timeline for corrective action to be taken:

Program Name: _____

Explain reasons for under or over performance standard:

Describe plan and timeline for corrective action to be taken:

Program Name: _____

Explain reasons for under or over performance standard:

Describe plan and timeline for corrective action to be taken:

_____ Authorized Signature _____ Date

AREA 12 AGENCY ON AGING

MONITORING PERFORMANCE STANDARDS

A. PURPOSES

1. To identify the service level that constitutes an acceptable performance
2. To determine at what point a service provider is under performing and requires corrective action or adjustments in scope of services (SOS) and/or contract amount.
3. To determine at what point a service provider's performance is out of compliance with terms of the contract.

B. STANDARDS

1. Performance goal is 100% of contracted SOS
2. **A performance level of less than 5% or more than 5% as compared to the Standard Percentage at any point in time**, will mean service provider is under/over performing and SOS and/or contract amount may be revised.
3. A performance level of less than 85% will mean service provider has not met terms of the contract. SOS and/or contract amount will be revised, or termination procedures will be implemented.
4. Performance level achieved by service provider will be one of the factors to be considered in the evaluation of application for future funding.

C. GENERAL GUIDELINES

1. Service provider is responsible for meeting all terms of the contract including provisions of the SOS.
2. Service provider is to maintain a cumulative performance level of 95% or more of units of service in SOS in order to be considered for continued funding at the full allocation.
3. Performance levels for Title III programs are calculated by comparing actual units to an annual SOS. The normal calculation is as follows:

Actual Units of Service
Scope of Service Units

Number of Days Y-T-D
365 Days

4. If cumulative year-to-date performance level at the end of a quarter falls (below) or over above 5% of the year-to-date contracted units of service, service provider shall submit a Contract Performance Report (A12AA Form Performance Standards-Exhibit G). The report is due to the Fiscal Officer by the 15th of the month following the final month of the quarter. Corrective action must be implemented within thirty (30) days of the beginning of the new quarter.

5. The Area 12 Staff, including the Executive Director, Assistant Director, Fiscal Officer and Planner shall meet periodically to review service provider performance levels. In the case of underperforming programs, the entities may recommend that actions be taken. The recommendations may be forwarded to the A12AA Advisory Council and A12AA Governing Board for their consideration/adoption. The recommendations may include:
 - A. Service provider must perform at a level of 95% or higher for the second/third quarter of their contract amount and/or SOS may/shall be reduced by the difference between 95% and their cumulative performance.
 - B. Service provider must perform at a least 95% or higher for the (first/second/third) quarter or their contract amount and/or SOS may/shall be reduced by the difference between 95% and their quarterly performance.
 - C. Service provider's cumulative performance must be 95% or higher by the end of the (second/third) quarter or their contract and/or SOS may/shall be reduced by the difference between 95% and their cumulative performance.
 - D. A condition may be placed on this year's contract: The program must achieve 95% of its SOS level for the last (quarter/half) of the contract year, or next year's funding award and/or SOS will be reduced.
 - E. A12AA staff to revise service provider's budget and/or SOS.

Instructions for Attached Form: Performance Standards – Exhibit G (pages #1 & 2)

1. Service provider can use quarterly calculations from the monthly financial report to fill in page #1. Only show programs that are out of compliance.
2. Page #2 must be filled out and turned in with the monthly financial reports, if quarterly YTD performance is out of compliance with terms of the contract.
3. If more pages needed, copy and paste page #2 only.