Veterans, Seniors, and Human Services Levy Advisory Board

Document: VSHSL Advisory Board Meeting Packet

Meeting Date: Wednesday, January 7th, 2026

Meeting Time: 4:00 pm to 5:30 pm

King County

King County
DCHS
Department of Community and Human Services

King County
VSHSL Veterans, Seniors, & Human Services Levy

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Meeting Overview

January 2026 Board Meeting Packet

January Advisory Board Meeting

Date: Wednesday, January 7, 2026

Time: 04:00 p.m. - 05:30 p.m.

Meeting Format: Virtual

Meeting location:

https://kingcounty.zoom.us/j/85783294569?pwd=jWatKHHNHPD5AfaK45IiZgRgkwKybx.1

How to Join

The upcoming Advisory Board Meeting will be held virtually via the King County Zoom platform. Individuals can enter the meeting using the login information provided below. If you experience difficulties logging into the meeting, please contact Traci Adair at tadair@kingcounty.gov

Join on your computer, mobile app, or room device.
Join Zoom Meeting
https://kingcounty.zoom.us/j/85783294569?pwd=jWatKHHNHPD5AfaK45IiZgRgkwKybx.1
Meeting ID: 857 8329 4569
Passcode: 649120

Accessibility

This material can be provided in different forms, such as large print, braille, or on a recording. Please contact Traci Adair at least one week prior to the event at tadair@kingcounty.gov to arrange an accommodation.

Notification of Minutes and Recordings

Unless it's an emergency situation or an executive session, all regular and special meetings of the VSHSL Advisory Board that involve final decision-making must be documented through detailed meeting minutes. These minutes will be preserved indefinitely. They should capture not only the comments of individual board members but also those of any guests who make presentations during the advisory board meetings. By participating in these meetings, board members agree to have their comments officially recorded in the minutes.

VSHSL
Veterans, Seniors, & Human Services Levy

VSHSL Advisory Board Meeting

Meeting Agenda

Meeting Date:
Wednesday, January 07, 2025

Meeting Time:
04:00 PM – 05:30 PM

Time	Agenda Item	Facilitator
04:00 pm	Attendance	Board
04:05 pm	Executive Session with ASD Division Director	Board
04:45 pm	Approval of Motion(s) (Motion and second to be made by Board)	Board
4:50 pm	Director Report • CQI Journey • Orientation • VSHSL Board Recruitment Packet and Application	Staff
5:10 pm	2026 VSHSL Advisory Board Meeting Dates	Staff
5:20 pm	Open Discussion	Board
5:30 pm	Meeting Adjournment	Board

VSHSL Advisory Board Meeting Minutes

January 2026 Board Meeting Packet

Meeting Date Covered: December 2025

Minutes to be approved in next meeting

Director's Report

January 2026 Board Meeting Packet

Director, Adult Services Director

Presentation: Director's Report

Facilitator: Michael Bailey

Purpose: The purpose of this presentation is to brief the Advisory Board on Presentation previously shared with Previous Department Director Kelly Rider.

Report one of two

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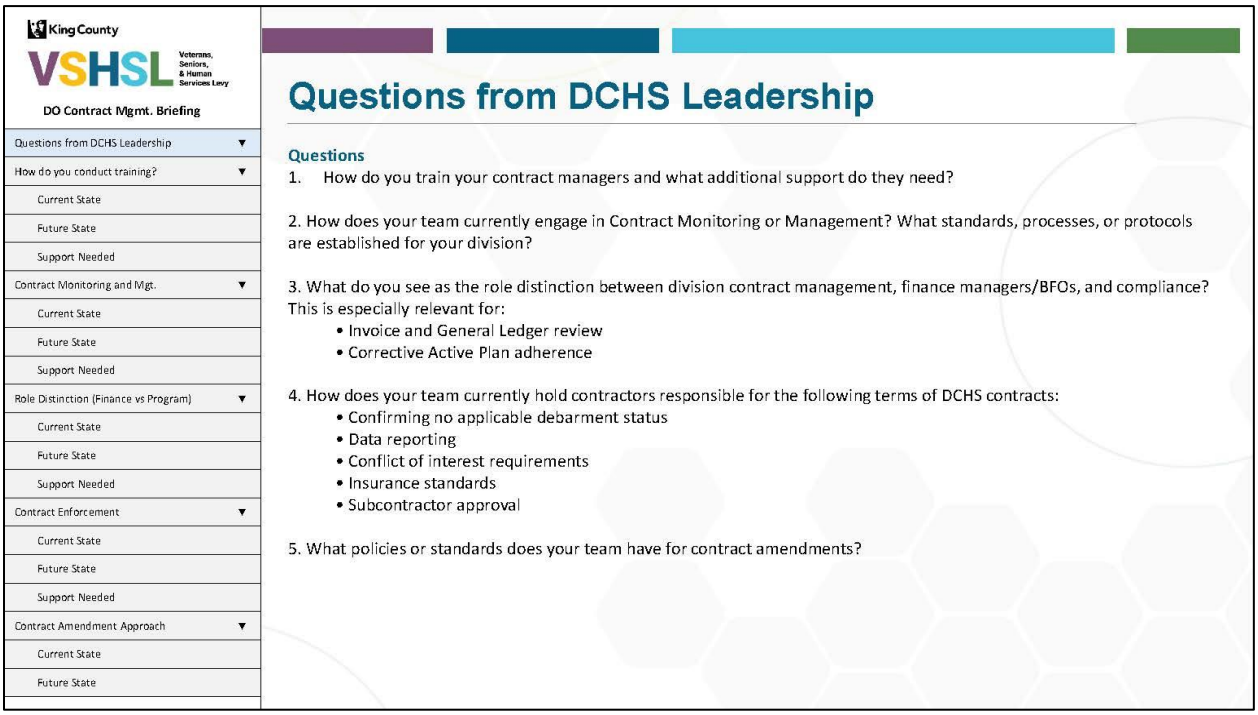
Questions from DCHS Leadership
How do you conduct training?
Current State
Future State
Support Needed
Contract Monitoring and Mgt.
Current State
Future State
Support Needed
Role Distinction (Finance vs Program)
Current State
Future State
Support Needed
Contract Enforcement
Current State
Future State
Support Needed
Contract Amendment Approach
Current State
Future State
Overview of Questions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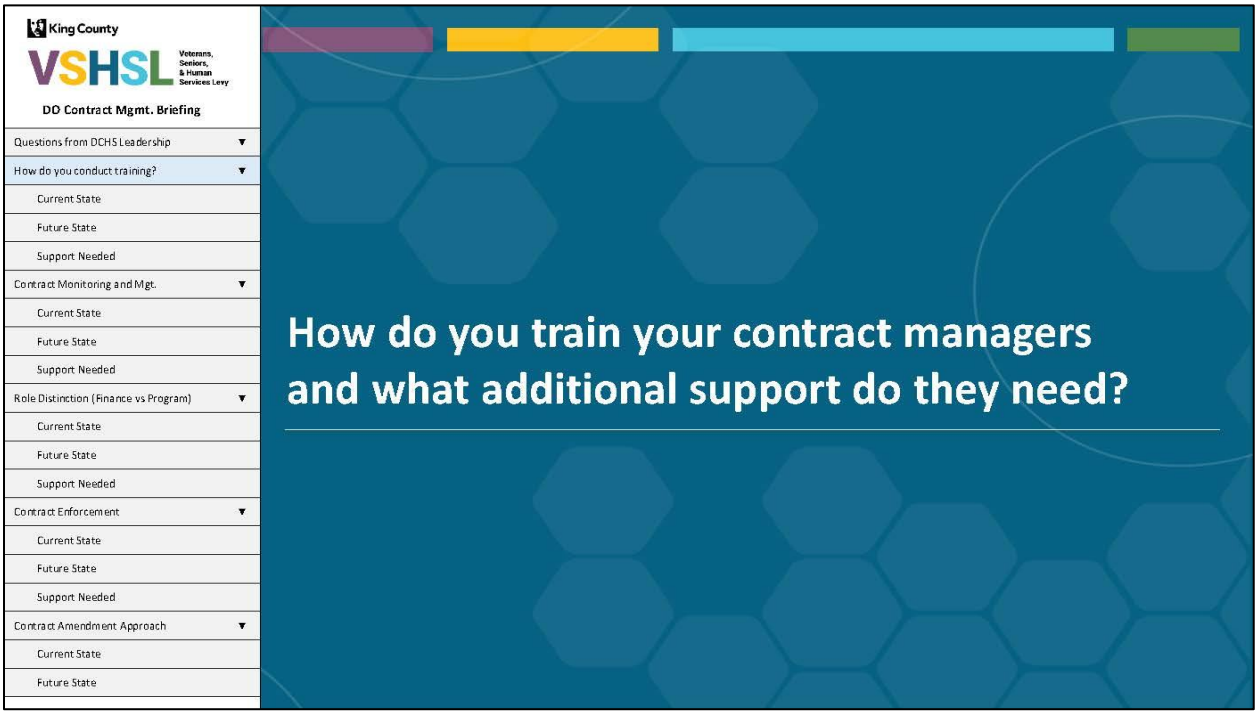
Questions
1. How do you train your contract managers and what additional support do they need?
2. How does your team currently engage in Contract Monitoring or Management? What standards, processes, or protocols are established for your division?
3. What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance? This is especially relevant for:
• Invoice and General Ledger review
• Corrective Active Plan adherence
4. How does your team currently hold contractors responsible for the following terms of DCHS contracts:
• Confirming no applicable debarment status
• Data reporting
• Conflict of interest requirements
• Insurance standards
• Subcontractor approval
5. What policies or standards does your team have for contract amendments?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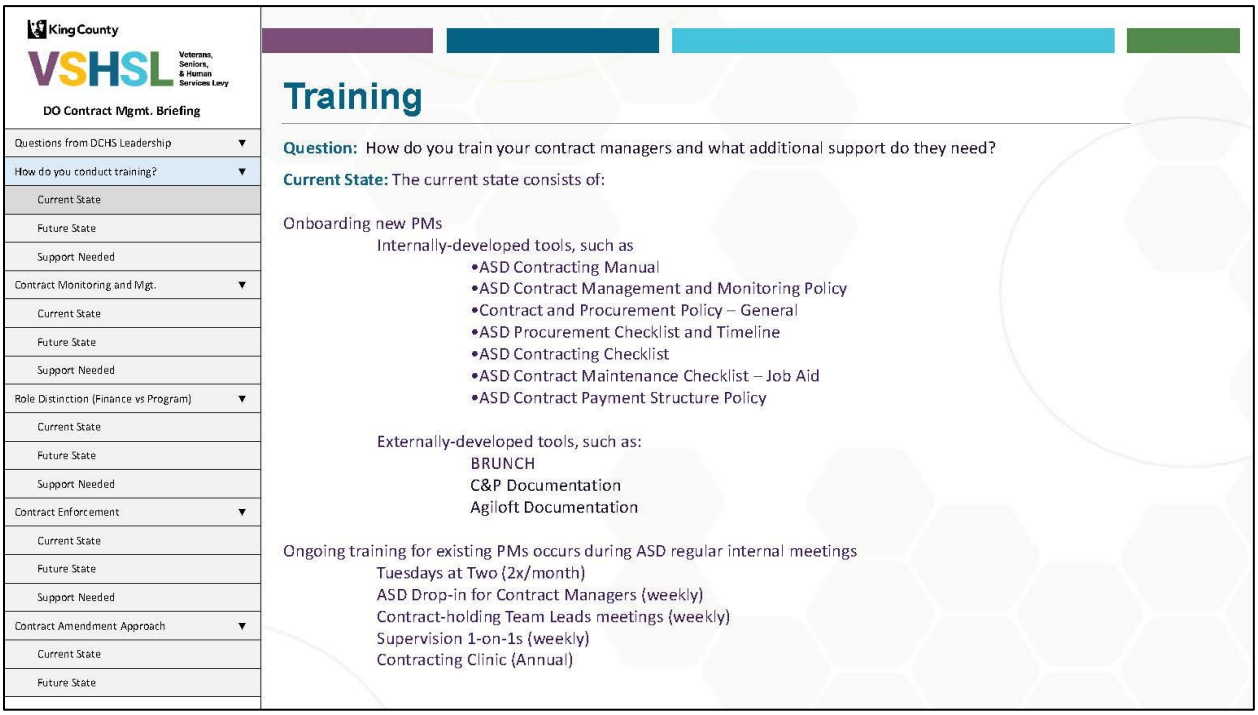
How do you train your contract managers and what additional support do they need?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Training
Question: How do you train your contract managers and what additional support do they need?
Current State: The current state consists of:
Onboarding new PMs
Internally-developed tools, such as
•ASD Contracting Manual
•ASD Contract Management and Monitoring Policy
•Contract and Procurement Policy – General
•ASD Procurement Checklist and Timeline
•ASD Contracting Checklist
•ASD Contract Maintenance Checklist – Job Aid
•ASD Contract Payment Structure Policy
Externally-developed tools, such as:
BRUNCH
C&P Documentation
Agiloft Documentation
Ongoing training for existing PMs occurs during ASD regular internal meetings
Tuesdays at Two (2x/month)
ASD Drop-in for Contract Managers (weekly)
Contract-holding Team Leads meetings (weekly)
Supervision 1-on-1s (weekly)
Contracting Clinic (Annual)

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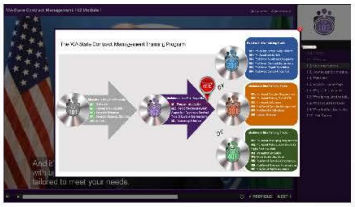
Question: How do you train your contract managers and what additional support do they need?

Future State: The future state will consist of:

1. A **three-part** self-service training course modeled after the Washington State Contract Training Model for new staff, and
2. A bi-annual refresher training for current staff.

Washington State Dept. of Enterprise Services: Contract Training



This is required training for all state employees who manage, monitor or are subject-matter experts on contracts.

Module 1: Overview
Module 2: Phases and Functions
Module 3: Essential Elements
Module 4: Contract Changes and Disputes

Module 1: Pre-Award Intro to Risk
Module 2: Post-Award Monitoring Obligations
Module 3: Post-Award Contract Modifications
Module 4: Post-Award Dispute Resolution
Module 5: Post-Award Contract Close Out

Module 1: Program Introduction
Module 2: Stakeholder Management

Module 1: Managing Compliance
Module 2: Managing Performance
Module 3: Invoice Review
Module 4: General Ledger Review

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Question: How do you train your contract managers and what additional support do they need?

Additional Resources Needed: The following list outlines additional support(s) needed:

PMs have requested simple, user-friendly, project management software tools – specifically ASANA.

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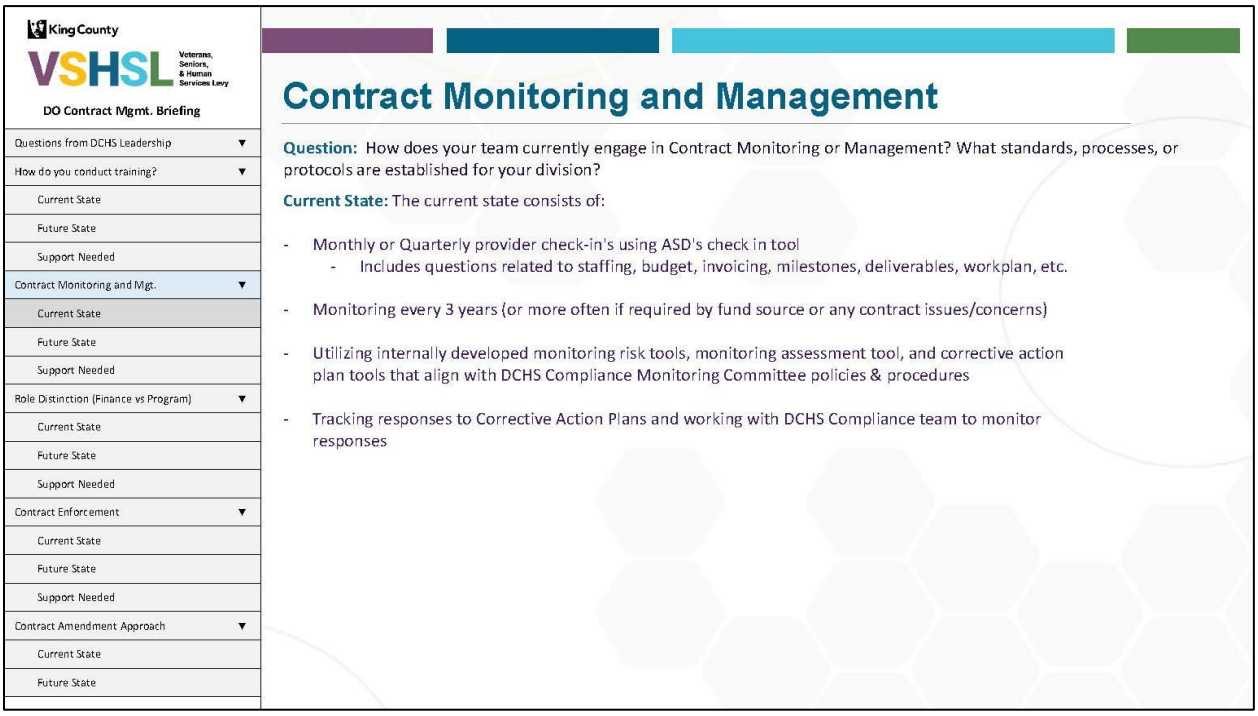
How does your team currently engage in Contract Monitoring or Management?
What standards, processes, or protocols are established for your division?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Contract Monitoring and Management
Question: How does your team currently engage in Contract Monitoring or Management? What standards, processes, or protocols are established for your division?
Current State: The current state consists of:
- Monthly or Quarterly provider check-in's using ASD's check in tool
  - Includes questions related to staffing, budget, invoicing, milestones, deliverables, workplan, etc.
- Monitoring every 3 years (or more often if required by fund source or any contract issues/concerns)
- Utilizing internally developed monitoring risk tools, monitoring assessment tool, and corrective action plan tools that align with DCHS Compliance Monitoring Committee policies & procedures
- Tracking responses to Corrective Action Plans and working with DCHS Compliance team to monitor responses

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Contract Monitoring and Management

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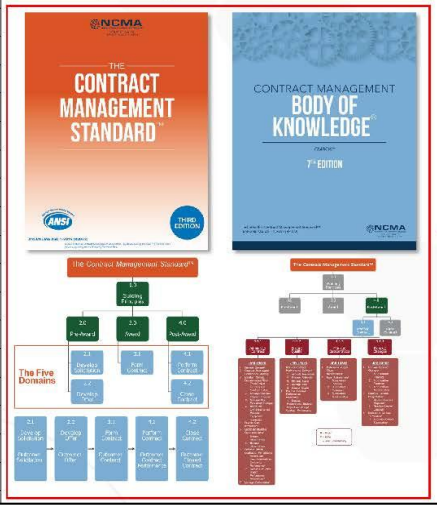
Future State: Establishment of Policies and Procedures, and a 2025 Procurement and Contract Management Manual.
Progress to date includes conducting an environmental scan of national standards, evaluating existing resources available through C&P, reviewing foundational work initiated by the previous OPS Director, and examining published policies and procedures from multiple state and county human services departments and procurement offices. *Important Note: The U.S. Office of Federal Procurement Policy (OFPP) has adopted the NCMA Contract Management Standard™ as the basis for its new civilian agency contracting training framework in 2023.*



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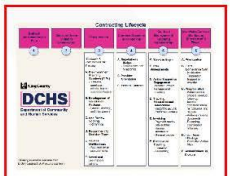

POLICIES:

ASD Contract and Procurement Policy – General

ASD Contract Payment Structure Policy

MANUALS:

ASD Contracting Manual

CHECKLISTS/JOB AIDS:

ASD Procurement Checklist and Timeline – Job Aid

ASD Contracting Checklist – Job Aid

ASD Contract Maintenance Checklist – Job Aid

+

Policies and Procedures from:
1. Connecticut Department of Social Services
2. Delaware Health and Social Services
3. City of Seattle, Human Services Department
4. State of New Jersey, Department of Children and Families
5. New York City Health and Human Services, Mayor's Office
6. Rhode Island Executive Office of Health and Human Services
7. Texas Health and Human Services
8. Washington State Department of Community and Human Services
9. Hartford, Connecticut Department of Children and Families
10. State of California Health and Human Services Agency, Department of Social Services
11. City of Albuquerque, Department of Family and Community Services
12. North Carolina Department of Health and Human Services

(+ 22 more entities/sources)

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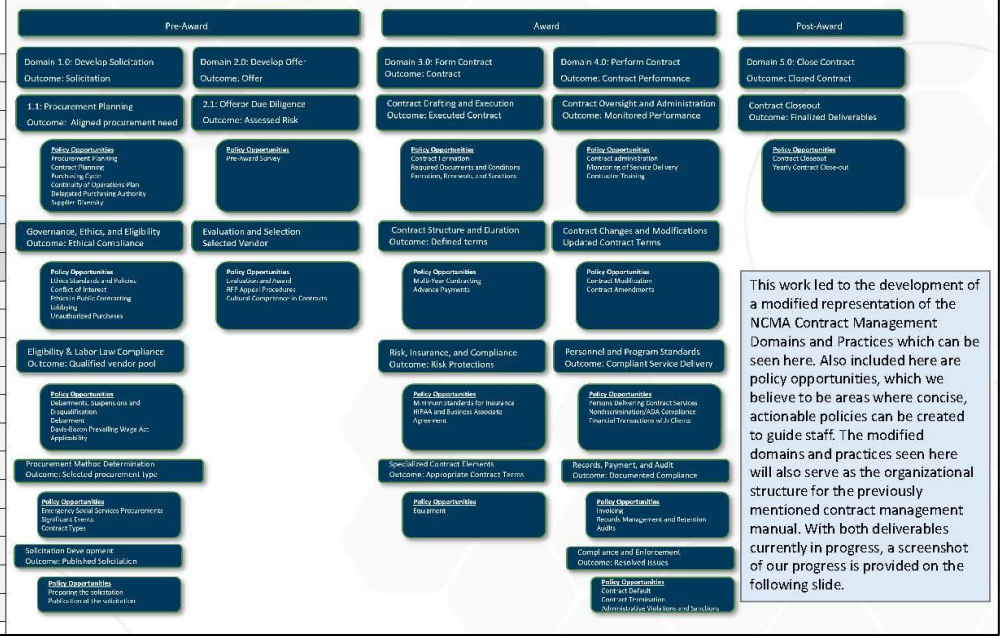

This work led to the development of a modified representation of the NCMA Contract Management Domains and Practices which can be seen here. Also included here are policy opportunities, which we believe to be areas where concise, actionable policies can be created to guide staff. The modified domains and practices seen here will also serve as the organizational structure for the previously mentioned contract management manual. With both deliverables currently in progress, a screenshot of our progress is provided on the following slide.

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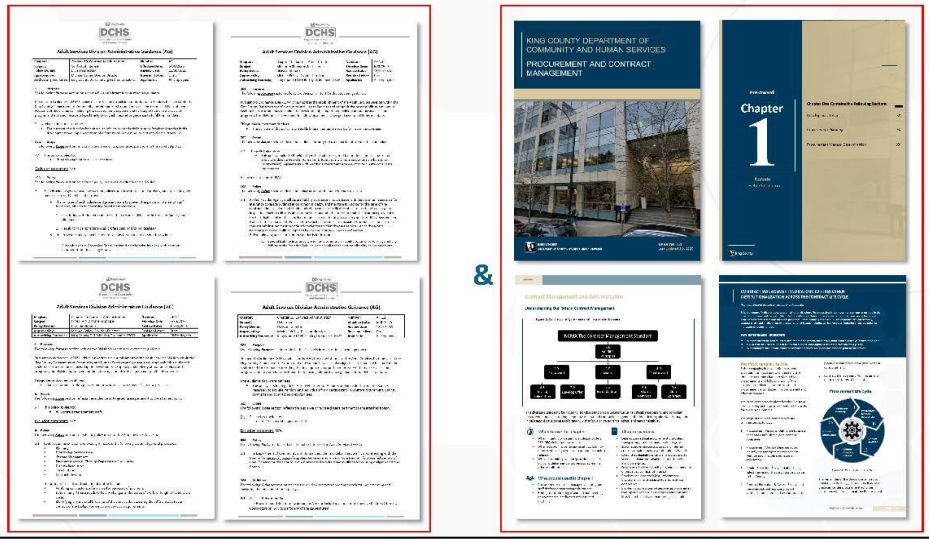
As previously mentioned, over the past few months, ASD has begun compiling relevant policies from other government agencies into a centralized repository. As new policies are added, they are stored within an ASD policy container. The next steps will involve removing duplicates, assessing each policy's relevance, and adapting the language and content to align with ASD's specific business needs. A parallel effort is underway to develop a comprehensive contract management manual.



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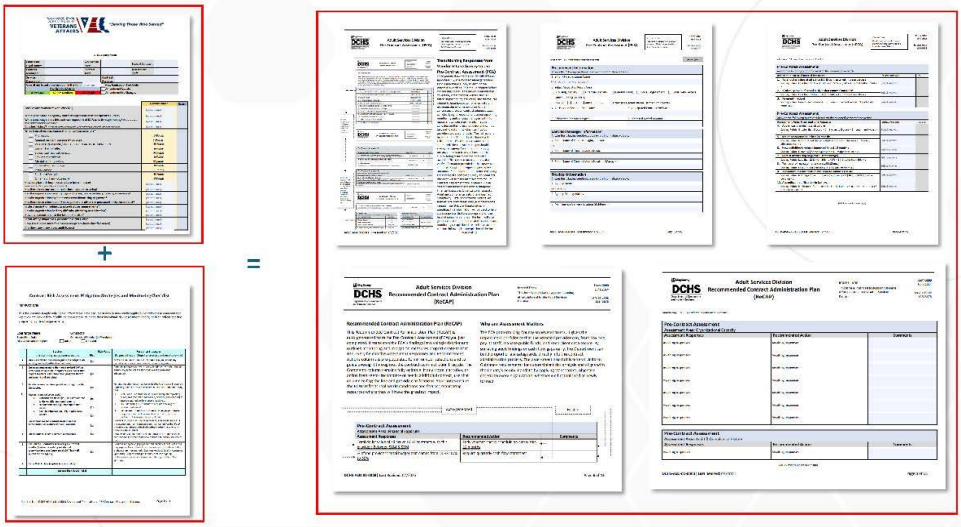
Another project involves adapting Washington State's RAMP Pre-Vendor assessment so that ASD can establish a similar pre-contract assessment process for contracts. Using responses from a survey completed by providers, this modified tool would generate recommended monitoring approaches and concern mitigation strategies appropriate for the level of concern identified. Because there is often a delay between the establishment of a contract and the provider's first formal risk assessment, this would help the Division proactively address potential issues while avoiding unnecessary risk.



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What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance?

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Role Distinction

Question: What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance? This is especially relevant for:
- Invoice and General Ledger review
- Corrective Active Plan adherence

Current State: The current state consists of:

Invoice review:
- PM reviews invoice & associated back-up documentation
- PM communicates with provider if any documentation is missing, erroneous, or if there are unallowable expenses
- PM discusses with supervisor if invoice issues are unresolved
- PM approves invoice, then logs in ASD's internal invoice monitor tool
- Finance reviews invoice & associated back-up documentation
- Any questions or conflicts result in conversation between Finance & PM; elevate as needed
- Finance approves invoice when all questions are resolved
- Compliance consulted and informed when invoice submittals are subject to terms of the DCHS Concerns Escalation & Reporting Protocol

General Ledger review:
- PM reviews GLs for allocated payment model contracts at Q2 & Q3
- All questions resolved with provider; elevated to Lead, CIT Manager, and Deputy Director if needed
- Once resolved, PM forwards GL to Finance team for 2nd-level review, then logs GL results in invoice monitor tool
- All GLs resulting in material variances are subject to ASD's Contract Payment Structure Policy

Corrective Active Plan adherence
- Deputy Division Director reviews & signs all Corrective Action Plans issued
- PM communicates with provider and sets deadline expectations for response
- Compliance is cc'd on all Corrective Action Plan; receives and reviews responses

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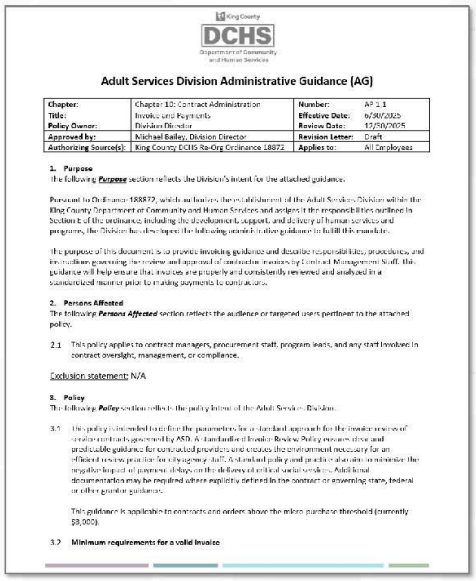
Future State: The future state will consist of:

- Invoice Review Policy
- Invoice Checklist



King County
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Department of Community and Human Services

Adult Services Division Administrative Guidance (AG)

Chapter:	Chapter 10: Contract Administration	**Number:**	AP 2.1
Title:	Invoice and Payments	**Effective Date:**	6/30/2025
Policy Owner:	Division Director	**Review Date:**	12/30/2025
Approved by:	Michael Bailey, Division Director	**Revision Letter:**	Draft
Authorizing Source(s):	King County DCHS Re-Org Ordinance 18872	**Applies to:**	All Employees

1. Purpose

The following ***Purpose*** section reflects the Division's intent for the attached guidance.

Pursuant to Ordinance 18872, which authorizes the establishment of the Adult Services Division within the King County Department of Community and Human Services and assigns it the responsibilities outlined in Section 8 of the ordinance, including the development, support, and delivery of human services and programs, the Division has developed the following guidance to fulfill its mandate.

The purpose of this document is to provide involving guidance and describe responsibilities, procedures, and instructions governing the review and approval of invoices/claims by Contract Management Staff. This guidance will help ensure that invoices are properly and consistently reviewed and analyzed in a standardized manner prior to making payments to contractors.

2. Persons Affected

The following ***Persons Affected*** section reflects the audience or targeted users pertinent to the attached policy.

2.1 This policy applies to contract managers, procurement staff, program leads, and any staff involved in contract oversight, management, or compliance.

Exclusion statement: N/A

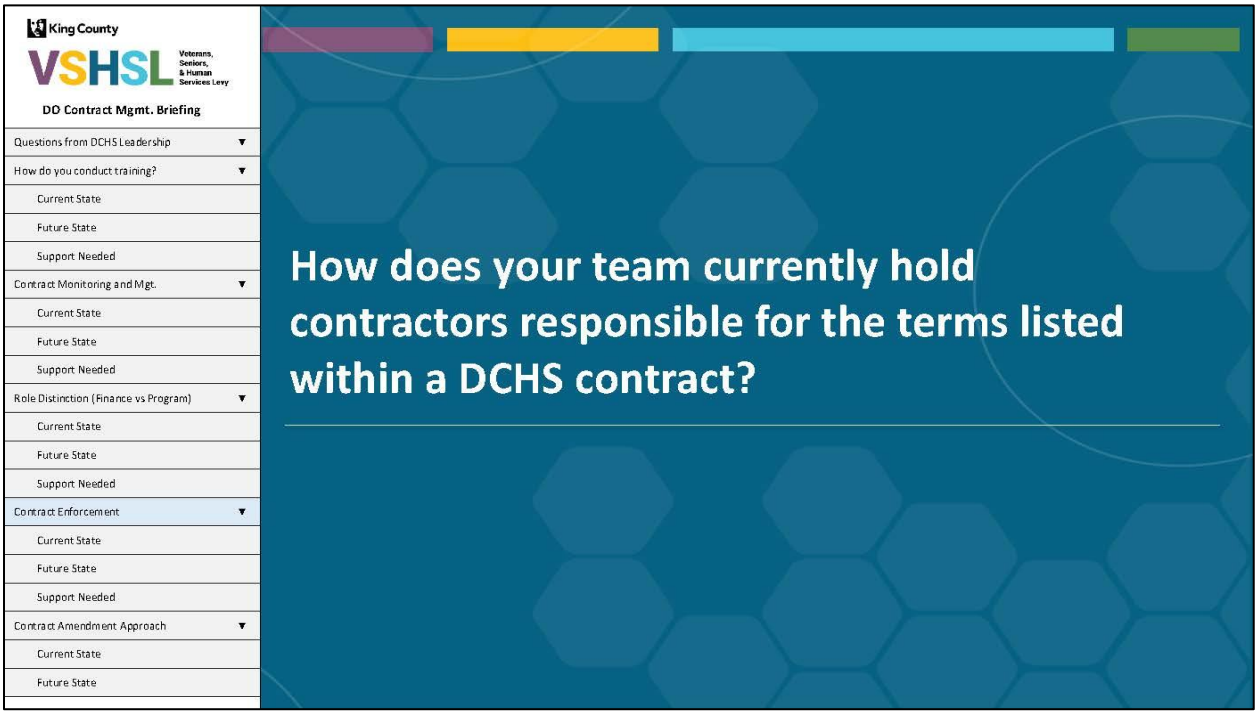
3. Policy

The following ***Policy*** section reflects the policy intent of the Adult Services Division.

3.1 This policy is intended to outline the parameters for a standard approach for the invoice review of invoices and claims governed by ASD. A standardized Invoice Review Policy ensures clear and predictable guidance for contracted providers, and creates the environment necessary for an efficient review practice for city agency staff. A standard policy and practice also minimizes the negative impact of payment delays on the delivery of critical social services. Additional documentation may be required where explicitly defined in the contract or governing state, federal or other granting guidance.

This guidance is applicable to contracts and orders above the micro-purchase threshold (currently $8,000).

3.2 **Minimum requirements for a valid invoice**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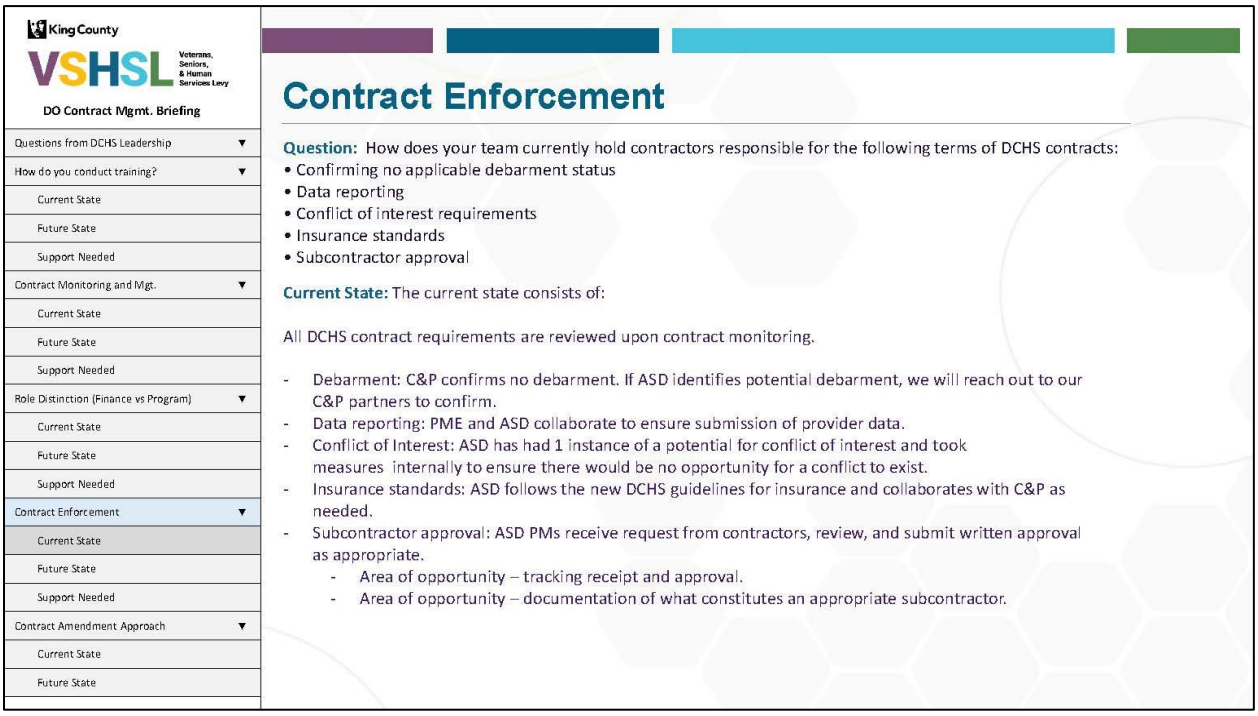
How does your team currently hold contractors responsible for the terms listed within a DCHS contract?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Question: How does your team currently hold contractors responsible for the following terms of DCHS contracts:
• Confirming no applicable debarment status
• Data reporting
• Conflict of interest requirements
• Insurance standards
• Subcontractor approval
Current State: The current state consists of:
All DCHS contract requirements are reviewed upon contract monitoring.
- Debarment: C&P confirms no debarment. If ASD identifies potential debarment, we will reach out to our C&P partners to confirm.
- Data reporting: PME and ASD collaborate to ensure submission of provider data.
- Conflict of Interest: ASD has had 1 instance of a potential for conflict of interest and took measures internally to ensure there would be no opportunity for a conflict to exist.
- Insurance standards: ASD follows the new DCHS guidelines for insurance and collaborates with C&P as needed.
- Subcontractor approval: ASD PMs receive request from contractors, review, and submit written approval as appropriate.
  - Area of opportunity – tracking receipt and approval.
  - Area of opportunity – documentation of what constitutes an appropriate subcontractor.

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  - Support Needed
- Contract Enforcement
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  - Future State
  - Support Needed
- Contract Amendment Approach
  - Current State
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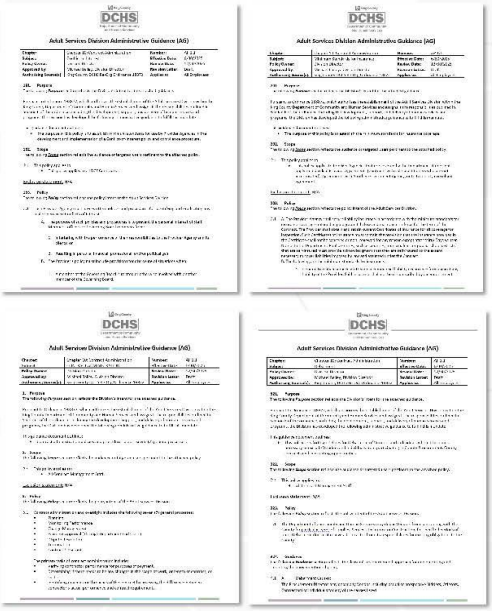
Future State: The future state will consist of:

- An ASD Conflict of Interest Policy and Procedure
- An ASD Minimum Standards for Insurance Policy and Procedure
- An ASD Contract Administration Policy

Subcontractor approval would be cited in the solicitation development policy and procedure under subcontractor requirements.



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What policies or standards does your team have for contract amendments?

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Contract Amendment(s)

Question: What policies or standards does your team have for contract amendments?

Current State: The current state consists of:

-PM or CIT Manager identifying rationale (need) for amendment & seeking approval from Deputy Director

-Initiating amendment negotiations with provider (budget, changes to scope and other terms if applicable)

-Following C&P & Agiloft protocol for launching amendment

-Amendments follow all review & approval steps as regular contracts

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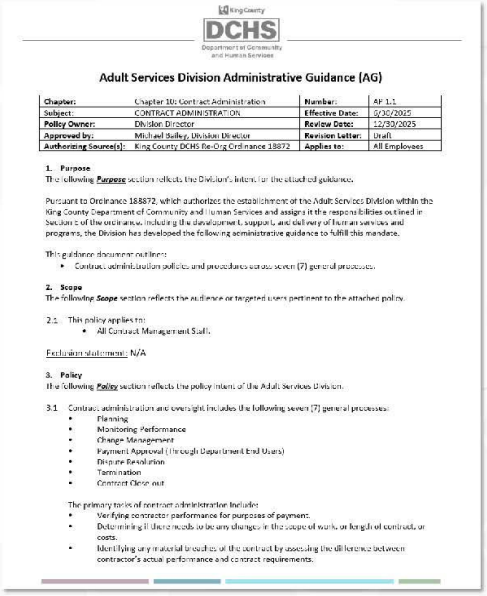
Future State: The future state will consist of:

- An ASD Contract Administration Policy

Contract amendments would be listed in this policy under change management but could be pulled out as a separate policy during the rewriting process.



King County
DCHS
Department of Community and Human Services

Adult Services Division Administrative Guidance (AG)

Chapter:	Chapter 10: Contract Administration	**Number:**	AP 1.1
Subject:	CONTRACT ADMINISTRATION	**Effective Date:**	9/30/2025
Policy Owner:	Division Director	**Review Date:**	12/30/2025
Approved by:	Michael Bulley, Division Director	**Revision Letter:**	Draft
Authorizing Source(s):	King County DCHS Re-Org Ordinance 18872	**Applies to:**	All Employees

1. Purpose

The following ***Purpose*** section reflects the Division's intent for the attached guidance.

Pursuant to Ordinance 18872, which authorizes the establishment of the Adult Services Division within the King County Department of Community and Human Services and assigns it the responsibilities outlined in Section 6 of the ordinance, including the development, support, and delivery of human services and programs, the Division has developed the following administrative guidance to fulfill this mandate.

This guidance document outlines:

- Contract administration policies and procedures across seven (7) general processes.

2. Scope

The following ***Scope*** section reflects the audience or targeted users pertinent to the attached policy.

2.1 This policy applies to:

- All Contract Management Staff.

Exclusion statement: N/A

3. Policy

The following ***Policy*** section reflects the policy intent of the Adult Services Division.

3.1 Contract administration and oversight includes the following seven (7) general processes:

- Planning
- Monitoring Performance
- Change Management
- Payment Approval (Through Department End Users)
- Dispute Resolution
- Termination
- Contract Close-out

The primary tasks of contract administration include:

- Verifying contractor performance for purposes of payment.
- Determining if there needs to be any changes in the scope of work, or length of contract, or costs.
- Identifying any material breaches of the contract by assessing the difference between contractor's actual performance and contract requirements.

List of Sources

1. **Delaware Health and Social Services** – Policy Manual for Division Contracts
2. **City of Seattle, Department of Education and Early Learning (DEEL)** – Funding Manual
3. **City of Seattle, Human Services Department (HSD)** – Funding Process Guide
4. **Florida Agricultural and Mechanical University** – Procurement Services Contract Management Manual
5. **State of New Jersey, Department of Children and Families** – Contract Reimbursement Manual
6. **Chesterfield County, Virginia** – Procurement Manual
7. **County of Los Angeles** – 2024 Audit Report: Finance, Contracts, Risk Management, and Grants Management
8. **Washington State Department of Enterprise Services** – Contract Management Manual
9. **New York City Health and Human Services, Mayor's Office** – Standard Health and Human Service Invoice Review Policy
10. **San Francisco Department of Public Health (DPH)** – Contractual Services Invoice Procedures Manual
11. **Rhode Island Executive Office of Health and Human Services** – Grants Administration Audit Report (Office of Internal Audit)
12. **Texas Southern University** – Contract Monitoring & Administration Plan
13. **Texas Health and Human Services** – Fiscal Monitoring Compliance Review Grantee Checklist
14. **Washington State Department of Community and Human Services (DCHS)** – Contract Risk Assessment, Mitigation Strategies, and Monitoring Checklist
15. **Georgia Department of Audits and Accounts** – Components of an Effective Contract Monitoring System
16. **Hartford, Connecticut Department of Children and Families** – Competitive Procurement Resources
17. **State of California Health and Human Services Agency, Department of Social Services** – Manual of Policies and Procedures: Social Service Standards
18. **State of Texas** – Procurement and Contract Management Guide
19. **Texas Department of Family and Protective Services** – Risk Analysis Questionnaire
20. **Texas Office of the Attorney General, Procurement and Contract Operations Division** – Procurement and Contract Management Handbook
21. **Department of Children and Family Services (DCFS)** – Contract Compliance and Performance Monitoring Standards and Procedures
22. **Connecticut Department of Social Services** – Contract Administration Unit Manual
23. **Wisconsin Department of Health Services** – Contract Administration Aging Policy Manual
24. **City of Albuquerque, Department of Family and Community Services** – Social Services Contracts Procurement Rules
25. **North Carolina Department of Health and Human Services** – Procurement, Contracts, and Grants Policy and Procedures Manual
26. **University of Texas at El Paso** – Contract Management Handbook
27. **Florida Department of Health (FDOH)** – Basic Contract Management Training
28. **Multnomah County (Oregon) Auditor** – Contracted Human Services Audit Report
29. **Municipal Research and Services Center (MRSC)** – Contracting for Services: Guidelines for Local Governments in Washington State
30. **National Association of State Procurement Officials (NASPO)** – Contract Administration Best Practices
31. **Arkansas Department of Transformation and Shared Services, Office of State Procurement** – Contract Administration Best Practices Guide
32. **The World Bank** – Procurement Guidance: Contract Management Practice
33. **Public Contract Institute** – GovCon 101: Allowable and Unallowable Costs
34. **Quick Reference Guide** – Allowable and Unallowable Costs for Federally Sponsored Projects, adapted from the University of Maine and the University of Wisconsin

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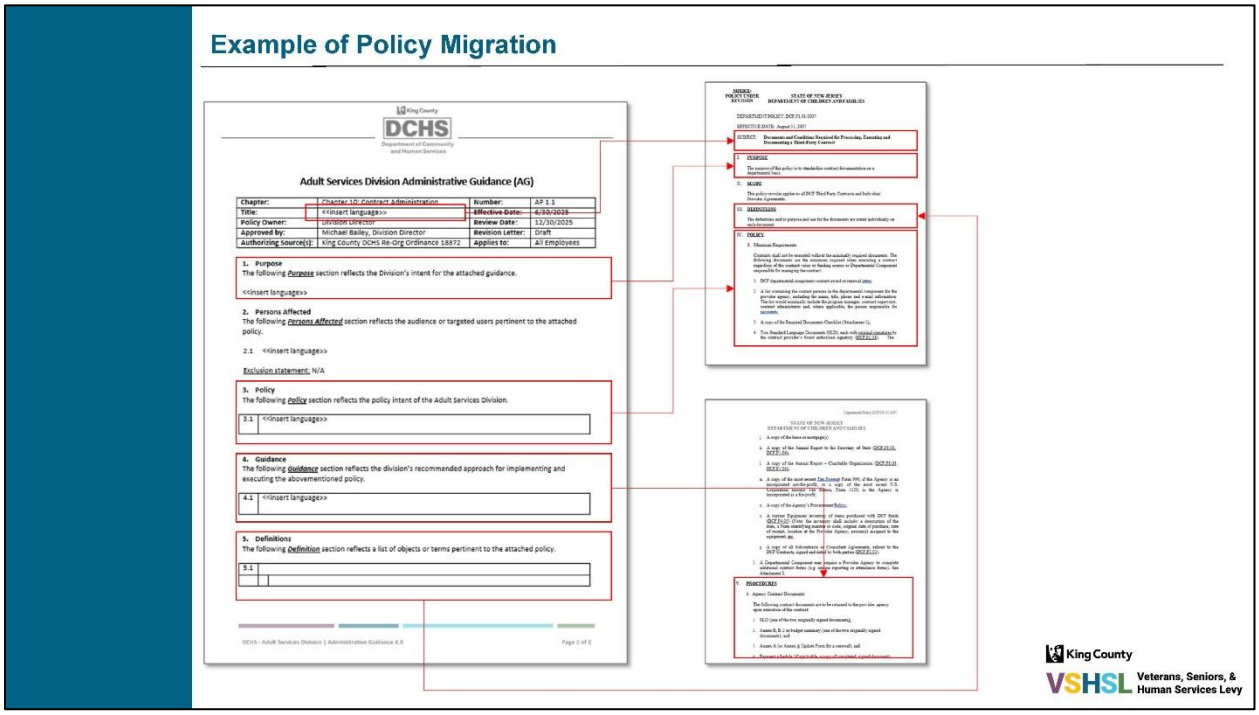
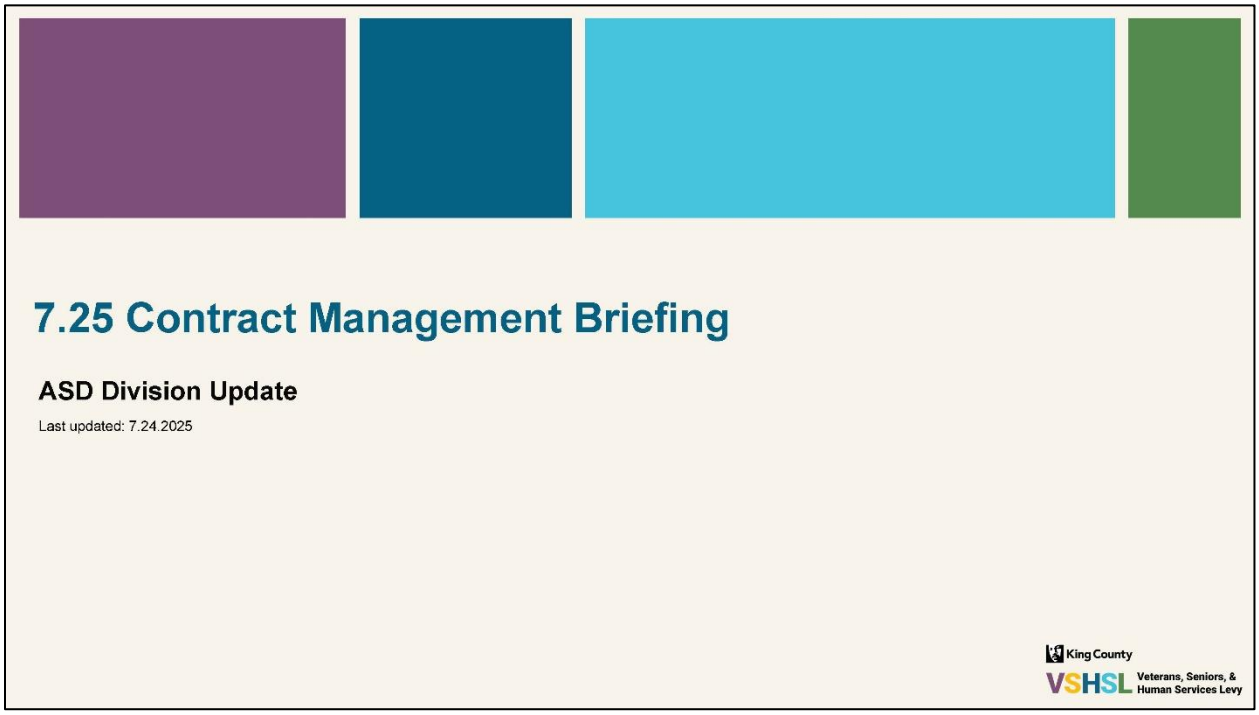


Report one of two


7.25 Contract Management Briefing
ASD Division Update
Last updated: 7.24.2025
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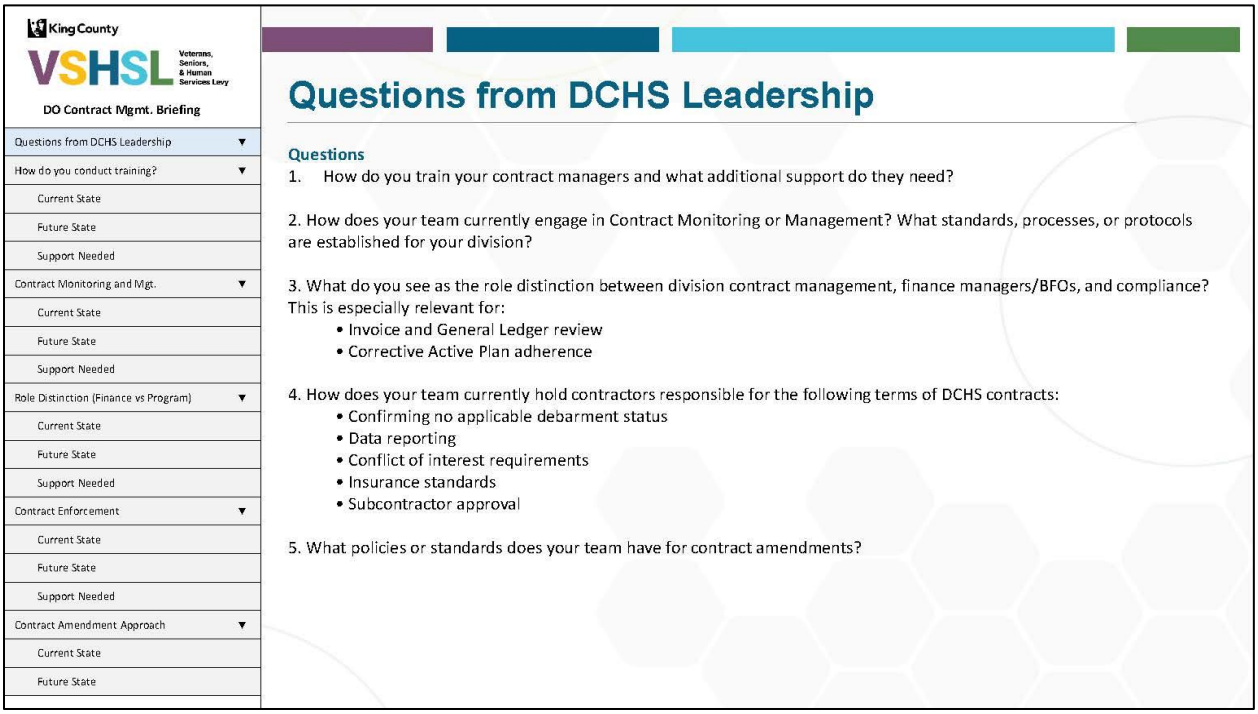
Overview of Questions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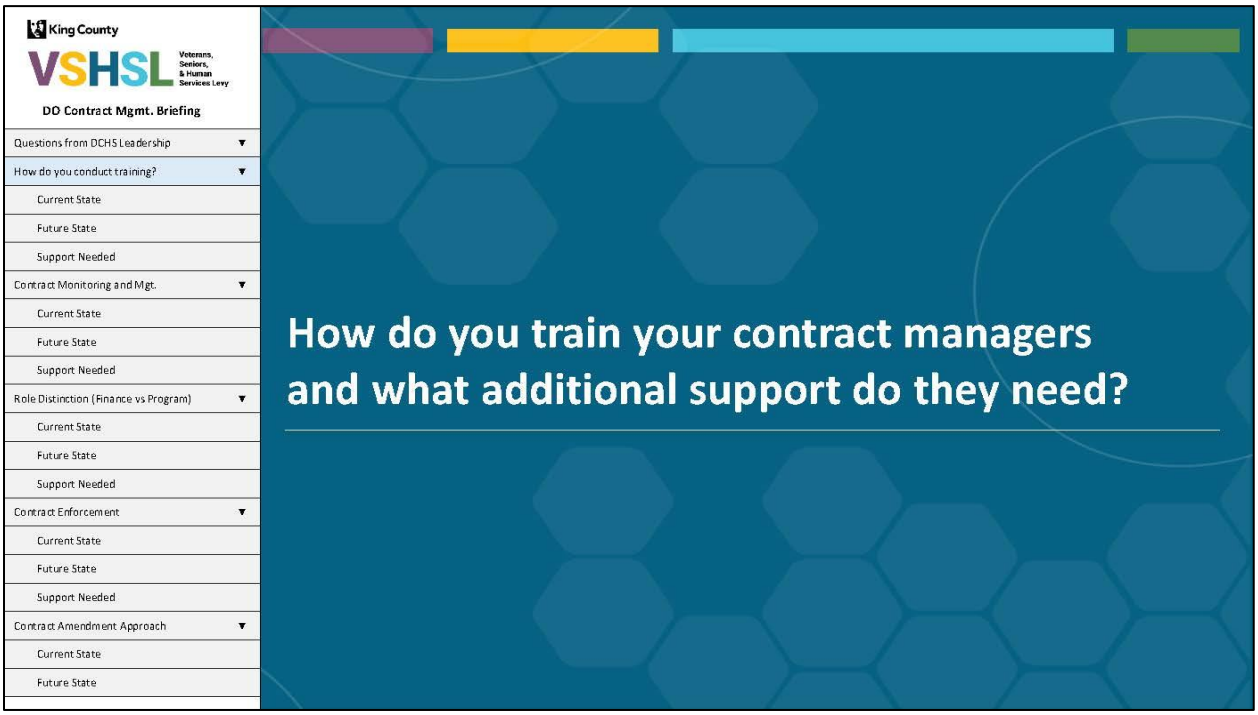
Questions
1. How do you train your contract managers and what additional support do they need?
2. How does your team currently engage in Contract Monitoring or Management? What standards, processes, or protocols are established for your division?
3. What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance? This is especially relevant for:
• Invoice and General Ledger review
• Corrective Active Plan adherence
4. How does your team currently hold contractors responsible for the following terms of DCHS contracts:
• Confirming no applicable debarment status
• Data reporting
• Conflict of interest requirements
• Insurance standards
• Subcontractor approval
5. What policies or standards does your team have for contract amendments?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How do you train your contract managers and what additional support do they need?

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Training

Question: How do you train your contract managers and what additional support do they need?

Current State: The current state consists of:

Onboarding new PMs
- Internally-developed tools, such as
  - •ASD Contracting Manual
  - •ASD Contract Management and Monitoring Policy
  - •Contract and Procurement Policy – General
  - •ASD Procurement Checklist and Timeline
  - •ASD Contracting Checklist
  - •ASD Contract Maintenance Checklist – Job Aid
  - •ASD Contract Payment Structure Policy
- Externally-developed tools, such as:
  - BRUNCH
  - C&P Documentation
  - Agiloft Documentation

Ongoing training for existing PMs occurs during ASD regular internal meetings
- Tuesdays at Two (2x/month)
- ASD Drop-in for Contract Managers (weekly)
- Contract-holding Team Leads meetings (weekly)
- Supervision 1-on-1s (weekly)
- Contracting Clinic (Annual)

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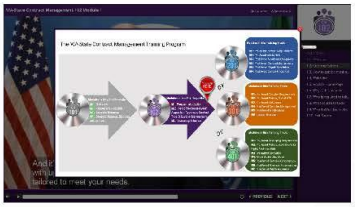
Question: How do you train your contract managers and what additional support do they need?

Future State: The future state will consist of:

1. A **three-part** self-service training course modeled after the Washington State Contract Training Model for new staff, and
2. A bi-annual refresher training for current staff.

Washington State Dept. of Enterprise Services: Contract Training



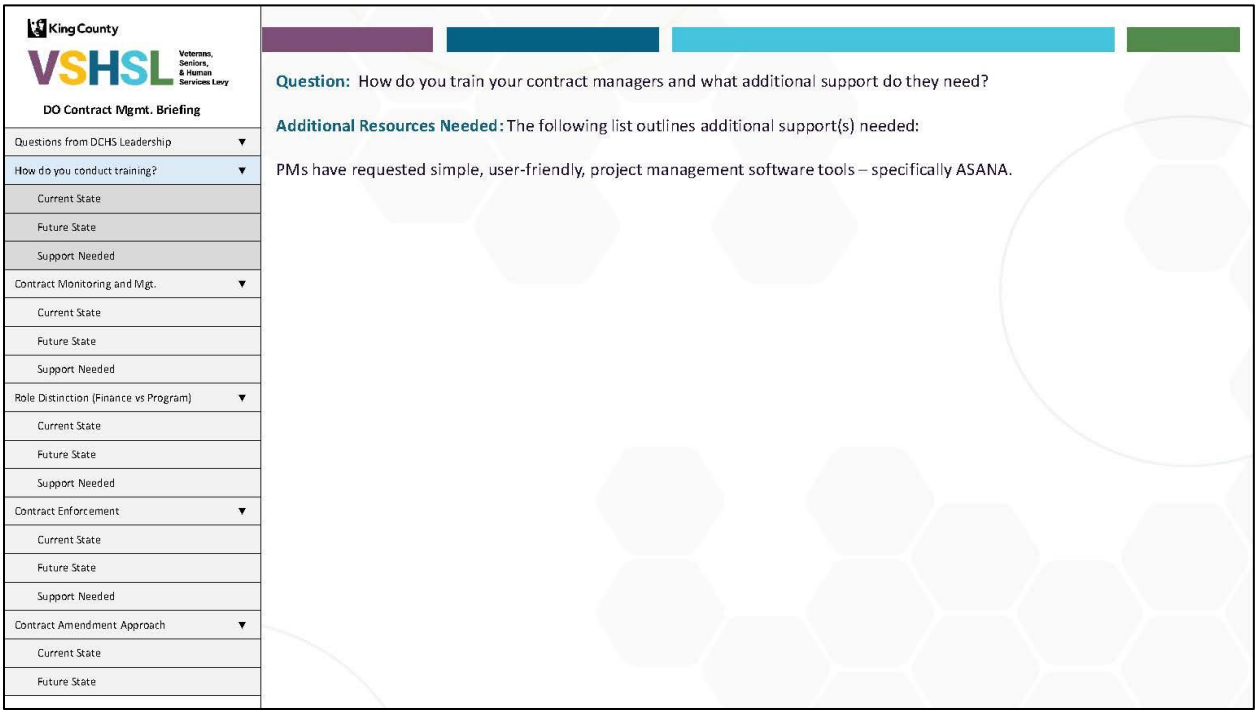
This is required training for all state employees who manage, monitor or are subject-matter experts on contracts.

Module 1: Overview
Module 2: Phases and Functions
Module 3: Essential Elements
Module 4: Contract Changes and Disputes

Module 1: Pre-Award Intro to Risk
Module 2: Post-Award Monitoring Obligations
Module 3: Post-Award Contract Modifications
Module 4: Post-Award Dispute Resolution
Module 5: Post-Award Contract Close Out

Module 1: Program Introduction
Module 2: Stakeholder Management

Module 1: Managing Compliance
Module 2: Managing Performance
Module 3: Invoice Review
Module 4: General Ledger Review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Question: How do you train your contract managers and what additional support do they need?
Additional Resources Needed: The following list outlines additional support(s) needed:
PMs have requested simple, user-friendly, project management software tools – specifically ASANA.

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How does your team currently engage in Contract Monitoring or Management?
What standards, processes, or protocols are established for your division?

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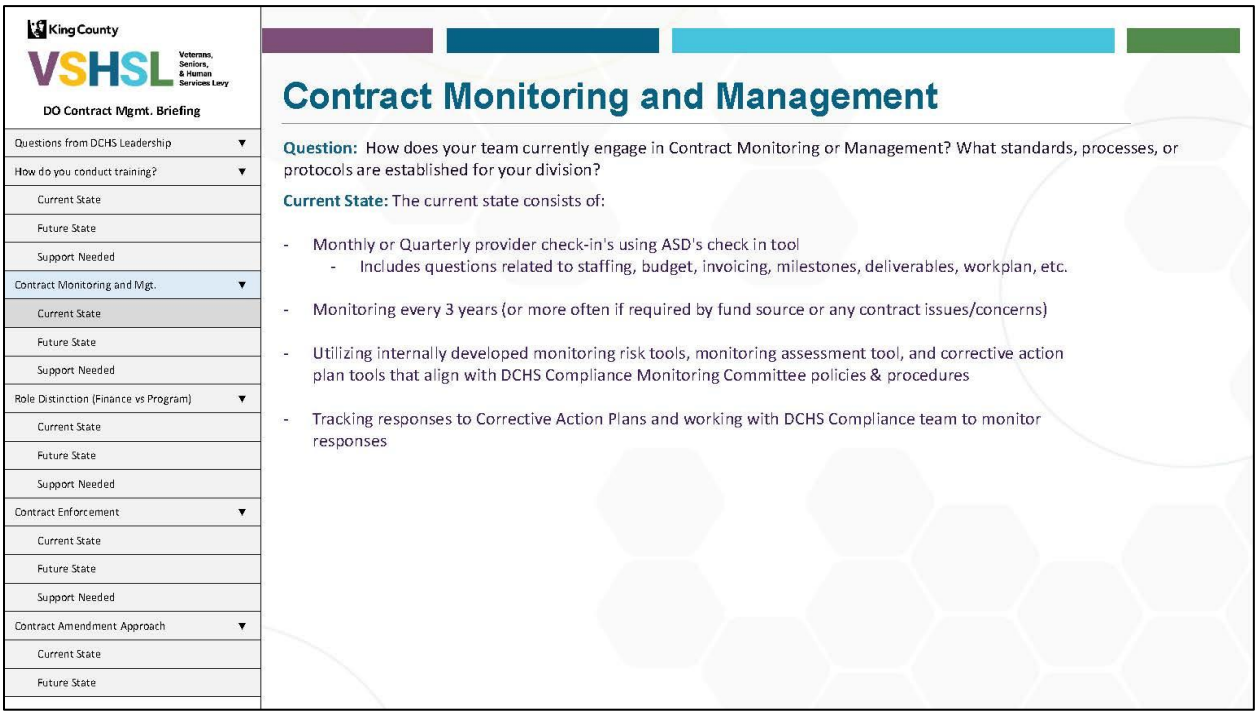
Question: How does your team currently engage in Contract Monitoring or Management? What standards, processes, or protocols are established for your division?
Current State: The current state consists of:
- Monthly or Quarterly provider check-in's using ASD's check in tool
- Includes questions related to staffing, budget, invoicing, milestones, deliverables, workplan, etc.
- Monitoring every 3 years (or more often if required by fund source or any contract issues/concerns)
- Utilizing internally developed monitoring risk tools, monitoring assessment tool, and corrective action plan tools that align with DCHS Compliance Monitoring Committee policies & procedures
- Tracking responses to Corrective Action Plans and working with DCHS Compliance team to monitor responses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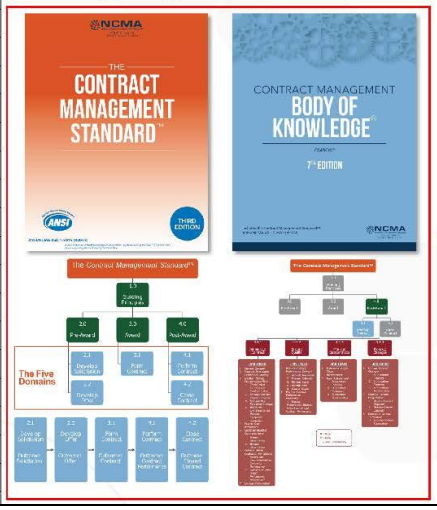
Future State: Establishment of Policies and Procedures, and a 2025 Procurement and Contract Management Manual.
Progress to date includes conducting an environmental scan of national standards, evaluating existing resources available through C&P, reviewing foundational work initiated by the previous OPS Director, and examining published policies and procedures from multiple state and county human services departments and procurement offices. *Important Note: The U.S. Office of Federal Procurement Policy (OFPP) has adopted the NCMA Contract Management Standard™ as the basis for its new civilian agency contracting training framework in 2023.*



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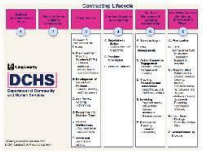

POLICIES:
ASD Contract and Procurement Policy – General
ASD Contract Payment Structure Policy
MANUALS:
ASD Contracting Manual
CHECKLISTS/JOB AIDS:
ASD Procurement Checklist and Timeline – Job Aid
ASD Contracting Checklist – Job Aid
ASD Contract Maintenance Checklist – Job Aid

+

Policies and Procedures from:
1. Connecticut Department of Social Services
2. Delaware Health and Social Services
3. City of Seattle, Human Services Department
4. State of New Jersey, Department of Children and Families
5. New York City Health and Human Services, Mayor's Office
6. Rhode Island Executive Office of Health and Human Services
7. Texas Health and Human Services
8. Washington State Department of Community and Human Services
9. Hartford, Connecticut Department of Children and Families
10. State of California Health and Human Services Agency, Department of Social Services
11. City of Albuquerque, Department of Family and Community Services
12. North Carolina Department of Health and Human Services

(+ 22 more entities/sources)

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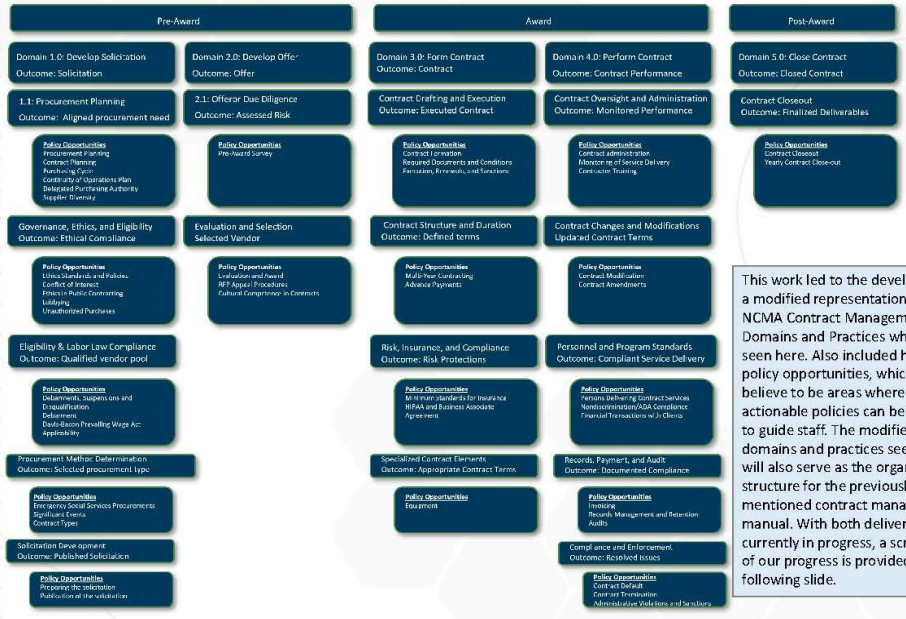

This work led to the development of a modified representation of the NCMA Contract Management Domains and Practices which can be seen here. Also included here are policy opportunities, which we believe to be areas where concise, actionable policies can be created to guide staff. The modified domains and practices seen here will also serve as the organizational structure for the previously mentioned contract management manual. With both deliverables currently in progress, a screenshot of our progress is provided on the following slide.

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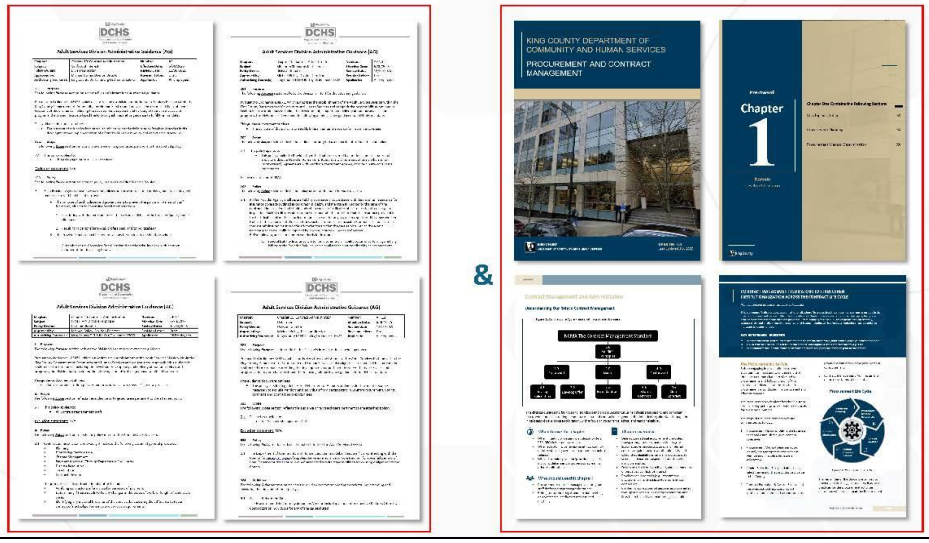
As previously mentioned, over the past few months, ASD has begun compiling relevant policies from other government agencies into a centralized repository. As new policies are added, they are stored within an ASD policy container. The next steps will involve removing duplicates, assessing each policy's relevance, and adapting the language and content to align with ASD's specific business needs. A parallel effort is underway to develop a comprehensive contract management manual.



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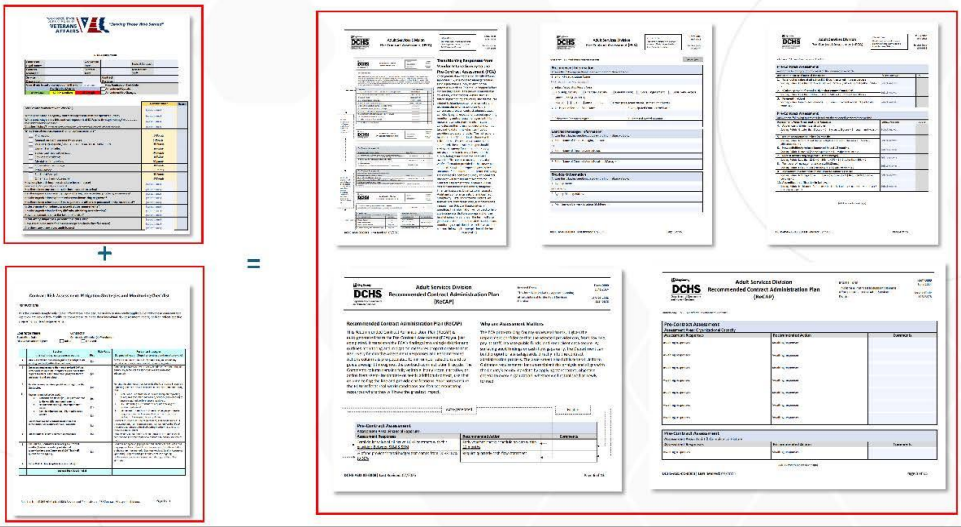
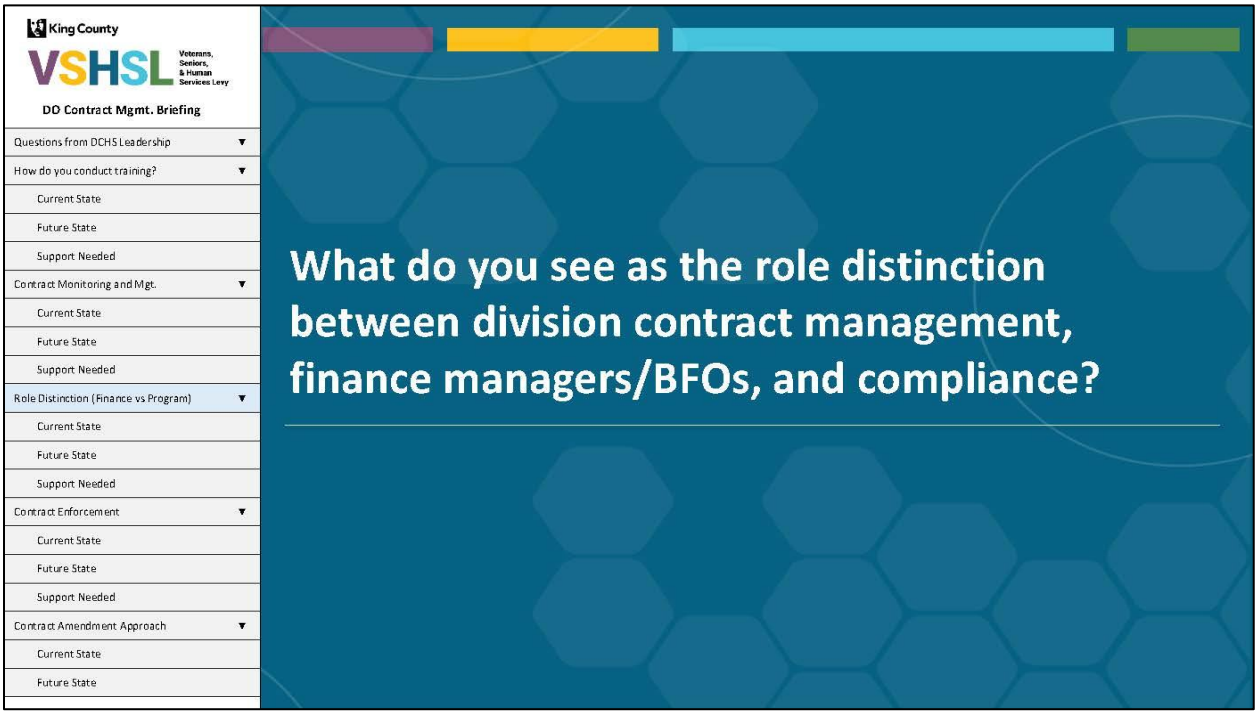
Another project involves adapting Washington State's RAMP Pre-Vendor assessment so that ASD can establish a similar pre-contract assessment process for contracts. Using responses from a survey completed by providers, this modified tool would generate recommended monitoring approaches and concern mitigation strategies appropriate for the level of concern identified. Because there is often a delay between the establishment of a contract and the provider's first formal risk assessment, this would help the Division proactively address potential issues while avoiding unnecessary risk.




King County
VSHSL
Veterans, Seniors, & Human Services Levy
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Questions from DCHS Leadership
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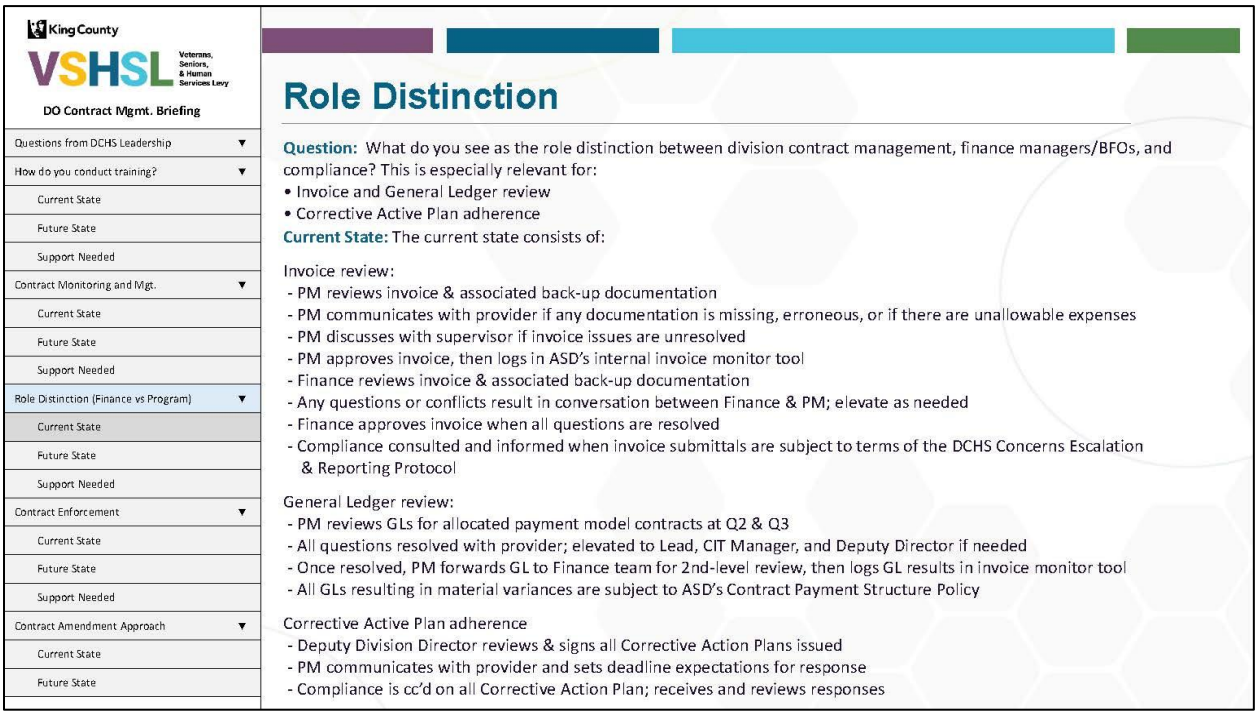
Current State
Future State
Support Needed
Contract Monitoring and Mgt.
Current State
Future State
Support Needed
Role Distinction (Finance vs Program)
Current State
Future State
Support Needed
Contract Enforcement
Current State
Future State
Support Needed
Contract Amendment Approach
Current State
Future State
What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance?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Future State
Support Needed
Contract Amendment Approach
Current State
Future State
Role Distinction
Question: What do you see as the role distinction between division contract management, finance managers/BFOs, and compliance? This is especially relevant for:
• Invoice and General Ledger review
• Corrective Active Plan adherence
Current State: The current state consists of:
Invoice review:
- PM reviews invoice & associated back-up documentation
- PM communicates with provider if any documentation is missing, erroneous, or if there are unallowable expenses
- PM discusses with supervisor if invoice issues are unresolved
- PM approves invoice, then logs in ASD's internal invoice monitor tool
- Finance reviews invoice & associated back-up documentation
- Any questions or conflicts result in conversation between Finance & PM; elevate as needed
- Finance approves invoice when all questions are resolved
- Compliance consulted and informed when invoice submittals are subject to terms of the DCHS Concerns Escalation & Reporting Protocol
General Ledger review:
- PM reviews GLs for allocated payment model contracts at Q2 & Q3
- All questions resolved with provider; elevated to Lead, CIT Manager, and Deputy Director if needed
- Once resolved, PM forwards GL to Finance team for 2nd-level review, then logs GL results in invoice monitor tool
- All GLs resulting in material variances are subject to ASD's Contract Payment Structure Policy
Corrective Active Plan adherence
- Deputy Division Director reviews & signs all Corrective Action Plans issued
- PM communicates with provider and sets deadline expectations for response
- Compliance is cc'd on all Corrective Action Plan; receives and reviews responses

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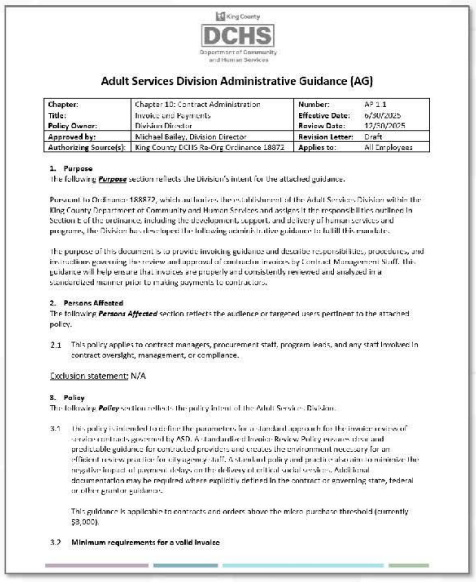
  - Future State
  - Support Needed
- Contract Enforcement
  - Current State
  - Future State
  - Support Needed
- Contract Amendment Approach
  - Current State
  - Future State

Future State: The future state will consist of:

- Invoice Review Policy
- Invoice Checklist



King County DCHS Department of Community and Human Services

Adult Services Division Administrative Guidance (AG)

Chapter:	Chapter 10: Contract Administration	**Number:**	AP 1.1
Title:	Invoice and Payments	**Effective Date:**	6/30/2025
Policy Owner:	Division Director	**Review Date:**	12/30/2025
Approved by:	Michael Bailey, Division Director	**Revision Letter:**	Draft
Authorizing Source(s):	King County DCHS Re-Org Ordinance 18872	**Applies to:**	All Employees

1. Purpose

The following ***Purpose*** section reflects the Division's intent for the attached guidance.

Pursuant to Ordinance 188872, which authorizes the establishment of the Adult Services Division within the King County Department of Community and Human Services and assigns it the responsibilities outlined in Section E of the ordinance, including the development, support, and delivery of human services and programs, the Division has developed the following administrative guidance to fulfill this mandate.

The purpose of this document is to provide invoicing guidance and describe responsibilities, procedures, and instructions governing the review and approval of individual invoices by Contract Management Staff. This guidance will help ensure that invoices are properly and consistently reviewed and analyzed in a standardized manner prior to making payments to contractors.

2. Persons Affected

The following ***Persons Affected*** section reflects the audience or targeted users pertinent to the attached policy.

2.1 This policy applies to contract managers, procurement staff, program leads, and any staff involved in contract oversight, management, or compliance.

Exclusion statement: N/A

3. Policy

The following ***Policy*** section reflects the policy intent of the Adult Services Division.

3.1 This policy is intended to establish the parameters for a standard approach for the invoice review of invoices routinely processed by ASD. A standardized Invoice Review Policy ensures clear and predictable guidance for contracted providers and creates the environment necessary for an efficient review process for city agency staff. A standard policy and practice also minimizes the negative impact of payment delays on the delivery of critical social services. Additional documentation may be required where explicitly defined in the contract or governing state, federal or other granting guidance.

This guidance is applicable to contracts and orders above the micro-purchase threshold (currently $8,000).

3.2 **Minimum requirements for a valid invoice**

King County
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- Contract Amendment Approach
  - Current State
  - Future State

How does your team currently hold contractors responsible for the terms listed within a DCHS contract?

King County VSHSL Veterans, Seniors, & Human Services Levy

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Contract Enforcement

Question: How does your team currently hold contractors responsible for the following terms of DCHS contracts:

- Confirming no applicable debarment status
- Data reporting
- Conflict of interest requirements
- Insurance standards
- Subcontractor approval

Current State: The current state consists of:

All DCHS contract requirements are reviewed upon contract monitoring.

- Debarment: C&P confirms no debarment. If ASD identifies potential debarment, we will reach out to our C&P partners to confirm.
- Data reporting: PME and ASD collaborate to ensure submission of provider data.
- Conflict of Interest: ASD has had 1 instance of a potential for conflict of interest and took measures internally to ensure there would be no opportunity for a conflict to exist.
- Insurance standards: ASD follows the new DCHS guidelines for insurance and collaborates with C&P as needed.
- Subcontractor approval: ASD PMs receive request from contractors, review, and submit written approval as appropriate.
  - Area of opportunity – tracking receipt and approval.
  - Area of opportunity – documentation of what constitutes an appropriate subcontractor.

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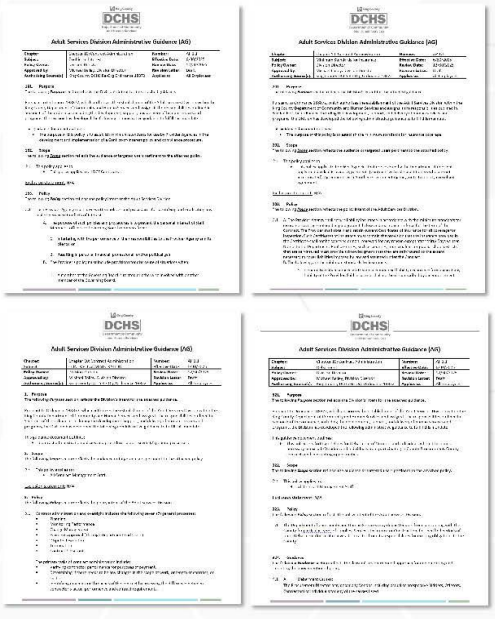
  - Future State
  - Support Needed
- Contract Enforcement
  - Current State
  - Future State
  - Support Needed
- Contract Amendment Approach
  - Current State
  - Future State

Future State: The future state will consist of:

- An ASD Conflict of Interest Policy and Procedure
- An ASD Minimum Standards for Insurance Policy and Procedure
- An ASD Contract Administration Policy

Subcontractor approval would be cited in the solicitation development policy and procedure under subcontractor requirements.



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Future State
Support Needed
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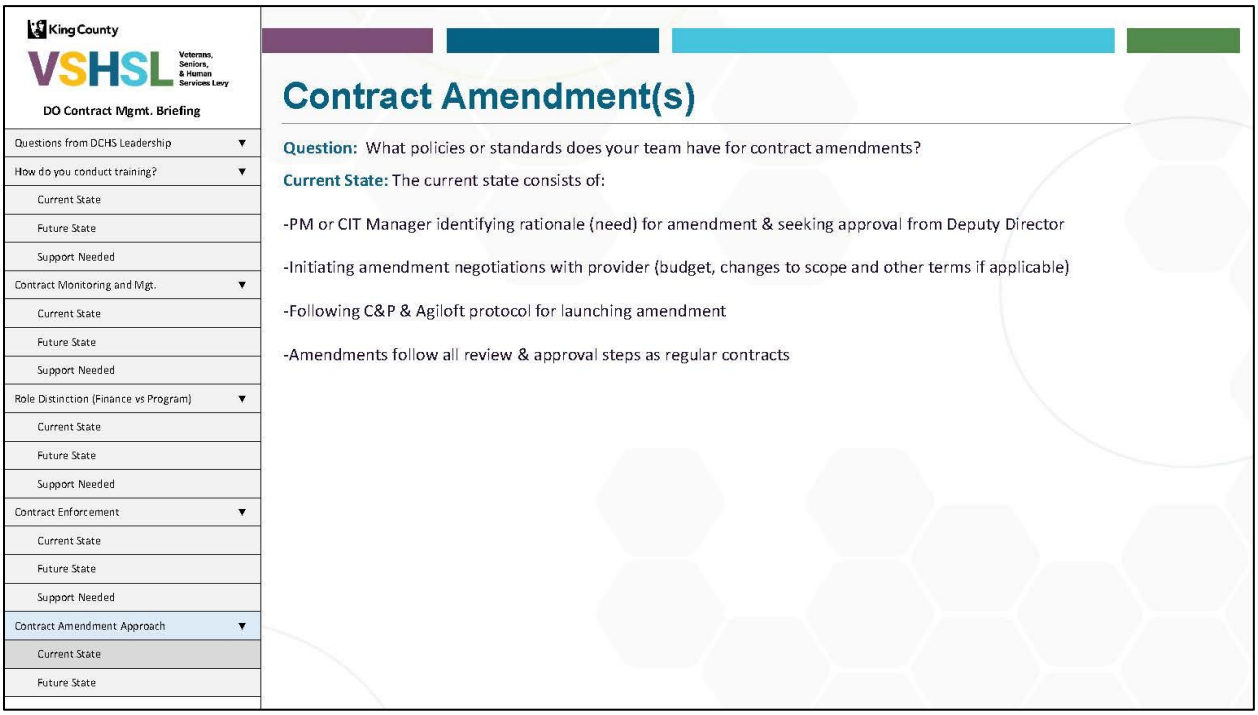
Future State
What policies or standards does your team have for contract amendments?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Support Needed
Contract Enforcement
Current State
Future State
Support Needed
Contract Amendment Approach
Current State
Future State
Contract Amendment(s)
Question: What policies or standards does your team have for contract amendments?
Current State: The current state consists of:
-PM or CIT Manager identifying rationale (need) for amendment & seeking approval from Deputy Director
-Initiating amendment negotiations with provider (budget, changes to scope and other terms if applicable)
-Following C&P & Agiloft protocol for launching amendment
-Amendments follow all review & approval steps as regular contracts

King County VSHSL Veterans, Seniors, & Human Services Levy

DO Contract Mgmt. Briefing

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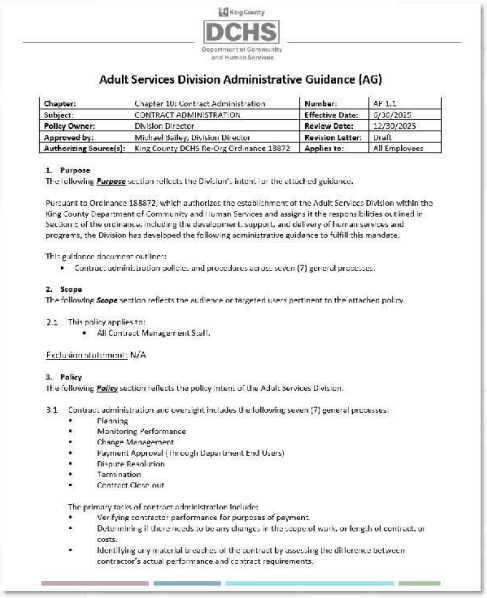
  - Future State
  - Support Needed
- Contract Enforcement
  - Current State
  - Future State
  - Support Needed
- Contract Amendment Approach
  - Current State
  - Future State

Future State: The future state will consist of:

- An ASD Contract Administration Policy

Contract amendments would be listed in this policy under change management but could be pulled out as a separate policy during the rewriting process.



King County DCHS Department of Community and Human Services

Adult Services Division Administrative Guidance (AG)

Chapter:	Chapter 10: Contract Administration	**Number:**	AP 1-1
Subject:	CONTRACT ADMINISTRATION	**Effective Date:**	9/30/2025
Policy Owner:	Division Director	**Review Date:**	12/30/2025
Approved by:	Michael Bailey, Division Director	**Revision Letter:**	Draft
Authorizing Source(s):	King County DCHS Re-Org Ordinance 18872	**Applies to:**	All Employees

1. Purpose

The following ***Purpose*** section reflects the Division's intent for the attached guidance.

Pursuant to Ordinance 18872, which authorizes the establishment of the Adult Services Division within the King County Department of Community and Human Services and assigns it the responsibilities outlined in Section 6 of the ordinance, including the development, support, and delivery of human services and programs, the Division has developed the following administrative guidance to fulfill this mandate.

This guidance document outlines:

- Contract administration policies and procedures across seven (7) general processes.

2. Scope

The following ***Scope*** section reflects the audience or targeted users pertinent to the attached policy.

2.1 This policy applies to:

- All Contract Management Staff.

Exclusion statement: N/A

3. Policy

The following ***Policy*** section reflects the policy intent of the Adult Services Division.

3.1 Contract administration and oversight includes the following seven (7) general processes:

- Planning
- Monitoring Performance
- Change Management
- Payment Approval (Through Department End Users)
- Dispute Resolution
- Termination
- Contract Close-out

The primary tasks of contract administration include:

- Verifying contractor performance for purposes of payment.
- Determining if there needs to be any changes in the scope of work, or length of contract, or costs.
- Identifying any material breaches of the contract by assessing the difference between contractor's actual performance and contract requirements.

King County VSHSL Veterans, Seniors, & Human Services Levy

DO Contract Mgmt. Briefing

- Questions from DCHS Leadership
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  - Future State
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- Contract Enforcement
  - Current State
  - Future State
  - Support Needed
- Contract Amendment Approach
  - Current State
  - Future State

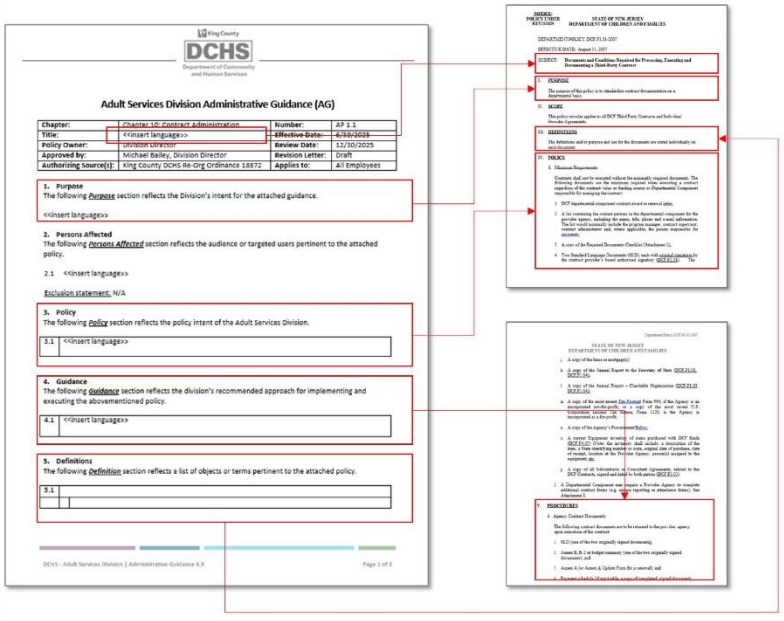
Appendixes

List of Sources

1. **Delaware Health and Social Services** – Policy Manual for Division Contracts
2. **City of Seattle, Department of Education and Early Learning (DEEL)** – Funding Manual
3. **City of Seattle, Human Services Department (HSD)** – Funding Process Guide
4. **Florida Agricultural and Mechanical University** – Procurement Services Contract Management Manual
5. **State of New Jersey, Department of Children and Families –** Contract Reimbursement Manual
6. **Chesterfield County, Virginia** – Procurement Manual
7. **County of Los Angeles** – 2024 Audit Report: Finance, Contracts, Risk Management, and Grants Management
8. **Washington State Department of Enterprise Services** – Contract Management Manual
9. **New York City Health and Human Services, Mayor's Office** – Standard Health and Human Service Invoice Review Policy
10. **San Francisco Department of Public Health (DPH)** – Contractual Services Invoice Procedures Manual
11. **Rhode Island Executive Office of Health and Human Services –** Grants Administration Audit Report (Office of Internal Audit)
12. **Texas Southern University –** Contract Monitoring & Administration Plan
13. **Texas Health and Human Services** – Fiscal Monitoring Compliance Review Grantee Checklist
14. **Washington State Department of Community and Human Services (DCHS) –** Contract Risk Assessment, Mitigation Strategies, and Monitoring Checklist
15. **Georgia Department of Audits and Accounts** – Components of an Effective Contract Monitoring System
16. **Hartford, Connecticut Department of Children and Families** – Competitive Procurement Resources
17. **State of California Health and Human Services Agency, Department of Social Services –** Manual of Policies and Procedures: Social Service Standards
18. **State of Texas** – Procurement and Contract Management Guide
19. **Texas Department of Family and Protective Services –** Risk Analysis Questionnaire
20. **Texas Office of the Attorney General, Procurement and Contract Operations Division** – Procurement and Contract Management Handbook
21. **Department of Children and Family Services (DCFS)** – Contract Compliance and Performance Monitoring Standards and Procedures
22. **Connecticut Department of Social Services –** Contract Administration Unit Manual
23. **Wisconsin Department of Health Services –** Contract Administration Aging Policy Manual
24. **City of Albuquerque, Department of Family and Community Services –** Social Services Contracts Procurement Rules
25. **North Carolina Department of Health and Human Services –** Procurement, Contracts, and Grants Policy and Procedures Manual
26. **University of Texas at El Paso –** Contract Management Handbook
27. **Florida Department of Health (FDOH) –** Basic Contract Management Training
28. **Multnomah County (Oregon) Auditor** – Contracted Human Services Audit Report
29. **Municipal Research and Services Center (MRSC) –** Contracting for Services: Guidelines for Local Governments in Washington State
30. **National Association of State Procurement Officials (NASPO)** – Contract Administration Best Practices
31. **Arkansas Department of Transformation and Shared Services, Office of State Procurement** – Contract Administration Best Practices Guide
32. **The World Bank** – Procurement Guidance: Contract Management Practice
33. **Public Contract Institute** – GovCon 101: Allowable and Unallowable Costs
34. **Quick Reference Guide** – Allowable and Unallowable Costs for Federally Sponsored Projects, adapted from the University of Maine and the University of Wisconsin

King County VSHSL Veterans, Seniors, & Human Services Levy

Example of Policy Migration



King County VSHSL Veterans, Seniors, & Human Services Levy

List of Polices in Stage 2 Development

1. Documents and Conditions Required for Processing, Executing, and Documenting a Third-Party Contract
2. Timely Execution, Renewal Conditions, and Sanctions for Contracts
3. Request for Proposals
4. Request for Proposals (RFP) Appeal Procedures
5. Contract Modification
6. Contract Modifications / Amendments
7. Contract Formation
8. Contract Administration
9. Contract Termination
10. Contract Closeout
11. Close-Out Procedures – Yearly Contract Close-Out
12. Close-Out Procedures – Contract Terminations
13. Contract Planning
14. Preparing the Solicitation
15. Publication of the Solicitation
16. Evaluation and Award
17. Contract Types
18. Contractor Training
19. Access to Records and Facilities; Retention of Contract Records; Confidentiality
20. Audits
21. Invoicing
22. Advance Payments
23. Pre-Award Survey
24. Significant Events
25. Emergency Social Services Procurements for the Safety of Children and Families
26. Multi-Year Contracting
27. Cultural Competence in Contracts
28. Lobbying
29. Equipment
30. Purchasing Cycle
31. Procurement Planning
32. Supplier Diversity
33. Delegated Purchasing Authority
34. Unauthorized Purchases
35. Debarments, Suspensions, and Disqualification Pursuant to Executive Order #34-1976
36. Debarment
37. Administrative Violations and Sanctions
38. Continuity of Operations Plan
39. Department and Provider Agency Monitoring of Level of Service Delivery
40. Persons Delivering Contract Services
41. Participant Service Waiting Lists
42. Financial Transactions with Clients, Patients, and Residents
43. Conflict of Interest
44. Conflict of Interest (Section 1.6)
45. Ethics in Public Contracting
46. Ethics Standards and Policies (Section 1.5)
47. Health Insurance Portability and Accountability Act (HIPAA) and Business Associate Agreement (BAA)
48. Nondiscrimination / Americans with Disabilities Act
49. Minimum Standards for Insurance
50. Applicability of the Federal Davis-Bacon Act and the New Jersey Prevailing Wage Act

King County
VSHSL Veterans, Seniors, & Human Services Levy

Report two of two

King County
VSHSL Veterans, Seniors, & Human Services Levy
Quarterly Update

- Agenda
- VSHSL Procurement Progress
  - 2025 Procurements
  - 2026 Procurements
  - 2027 and 2028 Procurements
  - Financial Stability
  - Healthy Living
  - Social Engagement
  - SS Access and Improvement
- Compliance Update
  - Policy Adherence
  - Additional Policy Work (Contracts)
  - Training Concept
- Projects
- Request for Support
  - Overcollections allocation

VSHSL Overview and Commitments

- ☐ Check-in: What are you hoping to get out of today's meeting
- ☐ VSHSL Procurement Progress
- ☐ Compliance Updates
- ☐ Upcoming Reports
- ☐ Projects In the Hopper
- ☐ Request for Support

Adult Services Division

Annual Community Impact Framework

Calendar Year 2025 – 2026

Department Vision

The Department of Community and Human Services supports and maintains vital communities, families and individuals.

Division Mission

The Adult Services Division works in partnership with communities to develop, support and provide human services programs focused on housing and financial stability, healthy living and social engagement for veterans, servicemembers and their families; older adults and their caregivers; and other resilient communities. The division's work also includes efforts to strengthen connections within, and improve access to, the human services system.

Division Values

Relations – Integrity – Services - Equity

Division Director's Office

Provide strategic leadership, accountability, and vision, ensuring Adult Services Division programs deliver equitable, transparent, and measurable results for King County residents.

King County Veteran's Program

Deliver respectful, client-centered navigation and supports that honor veterans and families, advancing housing stability, financial security, health, and community connection.

King County Veteran's Initiatives Team

Advance veteran well-being by managing contracts that reduce homelessness, support reentry, and expand access to culturally responsive and effective supportive services.

Policy and Community Engagement Team

Elevate community and client voice to shape equitable policies, expand access, and strengthen accountability across King County's human services strategies.

Community Investment Team/Operations

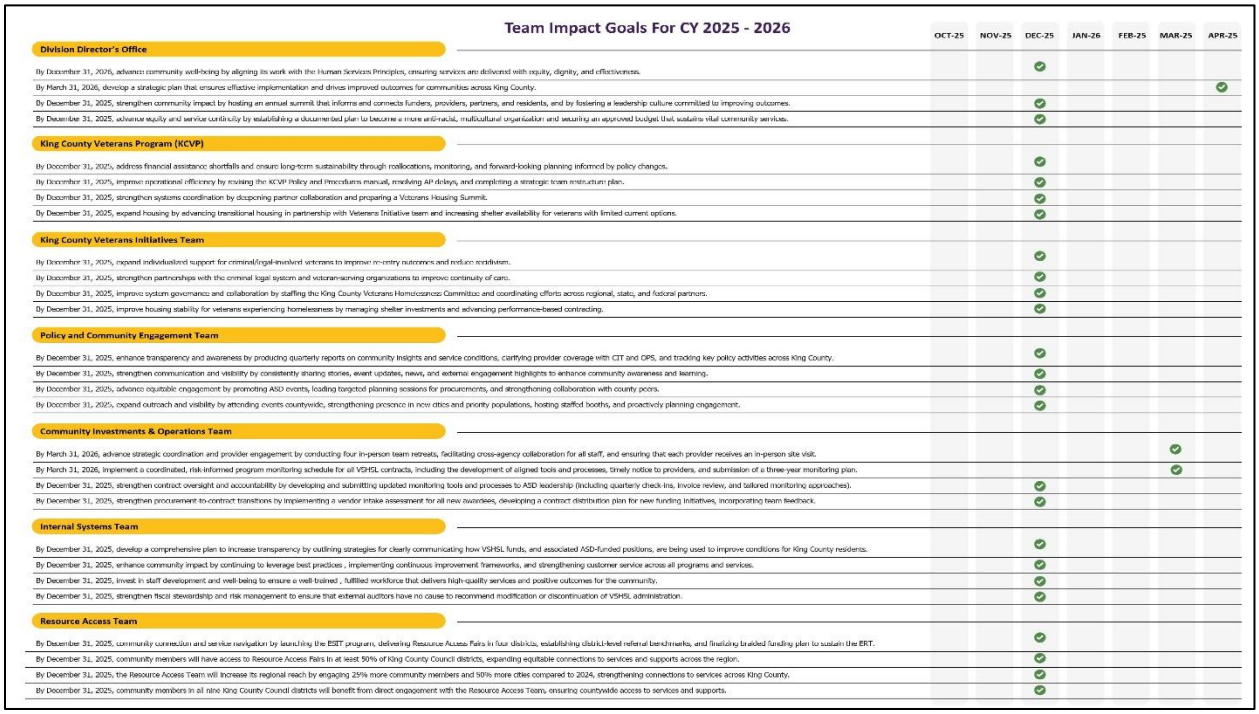
Steward levy funds through equitable, transparent procurement and contracting, supporting community-based organizations in delivering evidence-informed, measurable services and outcomes.

Internal Systems Team

Develop and maintain strong internal controls, policies, and systems that ensure compliance, accountability, efficiency, and success across the Adult Services Division.

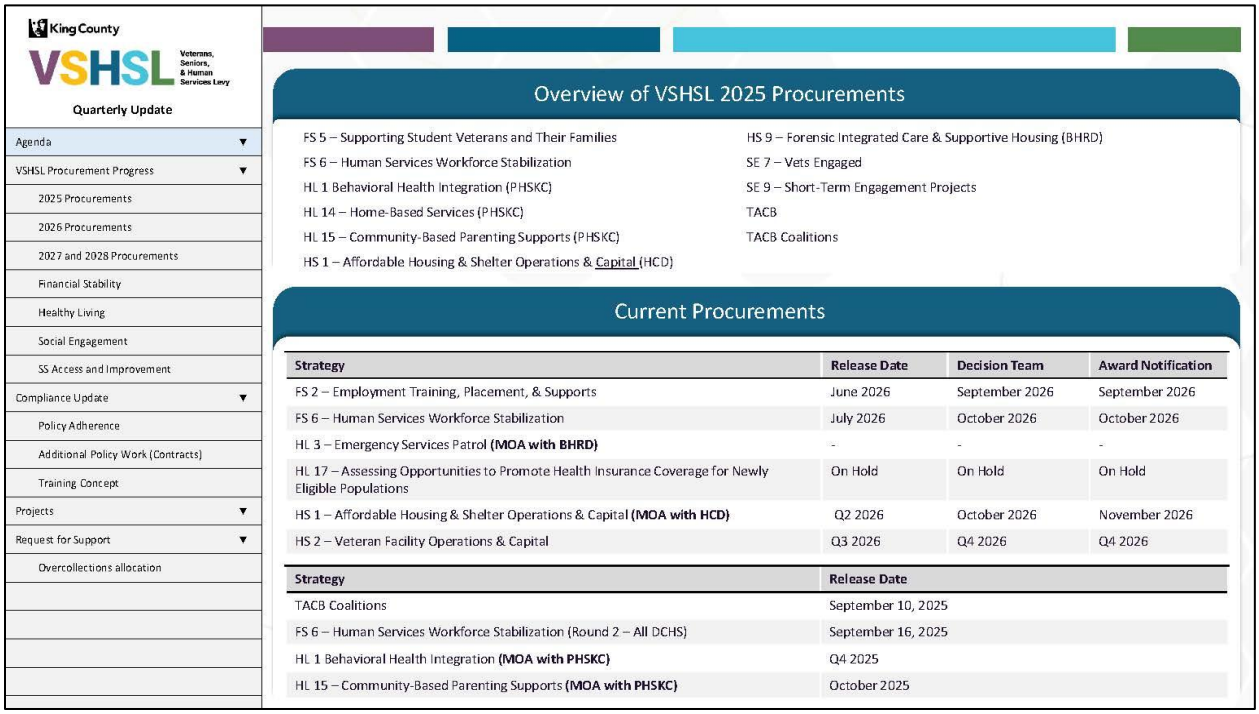
Resource Access Team

Expand equitable service access by coordinating outreach events, navigation supports, and partnerships, strengthening community connections across all nine council districts.



Team Impact Goals For CY 2025 - 2026

	OCT-25	NOV-25	DEC-25	JAN-26	FEB-25	MAR-25	APR-25
Division Director's Office							
By December 31, 2026, advance community well-being by aligning its work with the Human Services Principles, ensuring services are delivered with equity, dignity, and effectiveness.			✓				
By March 31, 2026, develop a strategic plan that ensures effective implementation and drives improved outcomes for communities across King County.							✓
By December 31, 2025, strengthen community impact by hosting an annual summit that informs and connects funders, providers, partners, and residents, and by fostering a leadership culture committed to improving outcomes.			✓				
By December 31, 2025, advance equity and service continuity by establishing a documented plan to become a more anti-racist, multicultural organization and securing an approved budget that sustains vital community services.			✓				
King County Veterans Program (KCVP)							
By December 31, 2025, address financial assistance shortfalls and ensure long-term sustainability through reallocations, monitoring, and forward-looking planning informed by policy changes.			✓				
By December 31, 2025, improve operational efficiency by revising the KCVP Policy and Procedures manual, resolving AP delays, and completing a strategic team restructure plan.			✓				
By December 31, 2025, strengthen systems coordination by deepening partner collaboration and preparing a Veterans Housing Summit.			✓				
By December 31, 2025, expand housing by advancing transitional housing in partnership with Veterans Initiative team and increasing shelter availability for veterans with limited current options.			✓				
King County Veterans Initiatives Team							
By December 31, 2025, expand individualized support for criminal/legal-involved veterans to improve re-entry outcomes and reduce recidivism.			✓				
By December 31, 2025, strengthen partnerships with the criminal legal system and veteran-serving organizations to improve continuity of care.			✓				
By December 31, 2025, improve system governance and collaboration by staffing the King County Veterans Homelessness Committee and coordinating efforts across regional, state, and federal partners.			✓				
By December 31, 2025, improve housing stability for veterans experiencing homelessness by managing shelter investments and advancing performance-based contracting.			✓				
Policy and Community Engagement Team							
By December 31, 2025, enhance transparency and awareness by producing quarterly reports on community insights and service conditions, clarifying provider coverage with CIT and OPS, and tracking key policy activities across King County.			✓				
By December 31, 2025, strengthen communication and visibility by consistently sharing stories, event updates, news, and external engagement highlights to enhance community awareness and learning.			✓				
By December 31, 2025, advance equitable engagement by promoting ASD events, leading targeted planning sessions for procurements, and strengthening collaboration with county peers.			✓				
By December 31, 2025, expand outreach and visibility by attending events countywide, strengthening presence in new cities and priority populations, hosting staffed booths, and proactively planning engagement.			✓				
Community Investments & Operations Team							
By March 31, 2026, advance strategic coordination and provider engagement by conducting four in-person team retreats, facilitating cross-agency collaboration for all staff, and ensuring that each provider receives an in-person site visit.						✓	
By March 31, 2026, implement a coordinated, risk-informed program monitoring schedule for all VSHSL contracts, including the development of aligned tools and processes, timely notice to providers, and submission of a three-year monitoring plan.						✓	
By December 31, 2025, strengthen contract oversight and accountability by developing and submitting updated monitoring tools and processes to ASD leadership (including quarterly check-ins, invoice review, and tailored monitoring approaches).			✓				
By December 31, 2025, strengthen procurement-to-contract transitions by implementing a vendor intake assessment for all new awardees, developing a contract distribution plan for new funding initiatives, incorporating team feedback.			✓				
Internal Systems Team							
By December 31, 2025, develop a comprehensive plan to increase transparency by outlining strategies for clearly communicating how VSHSL funds, and associated ASD-funded positions, are being used to improve conditions for King County residents.			✓				
By December 31, 2025, enhance community impact by continuing to leverage best practices , implementing continuous improvement frameworks, and strengthening customer service across all programs and services.			✓				
By December 31, 2025, invest in staff development and well-being to ensure a well-trained , fulfilled workforce that delivers high-quality services and positive outcomes for the community.			✓				
By December 31, 2025, strengthen fiscal stewardship and risk management to ensure that external auditors have no cause to recommend modification or discontinuation of VSHSL administration.			✓				
Resource Access Team							
By December 31, 2025, community connection and service navigation by launching the ERT program, delivering Resource Access Fairs in four districts, establishing district-level referral benchmarks, and finalizing braided funding plan to sustain the ERT.			✓				
By December 31, 2025, community members will have access to Resource Access Fairs in at least 50% of King County Council districts, expanding equitable connections to services and supports across the region.			✓				
By December 31, 2025, the Resource Access Team will increase its regional reach by engaging 25% more community members and 50% more cities compared to 2024, strengthening connections to services across King County.			✓				
By December 31, 2025, community members in all nine King County Council districts will benefit from direct engagement with the Resource Access Team, ensuring countywide access to services and supports.			✓				



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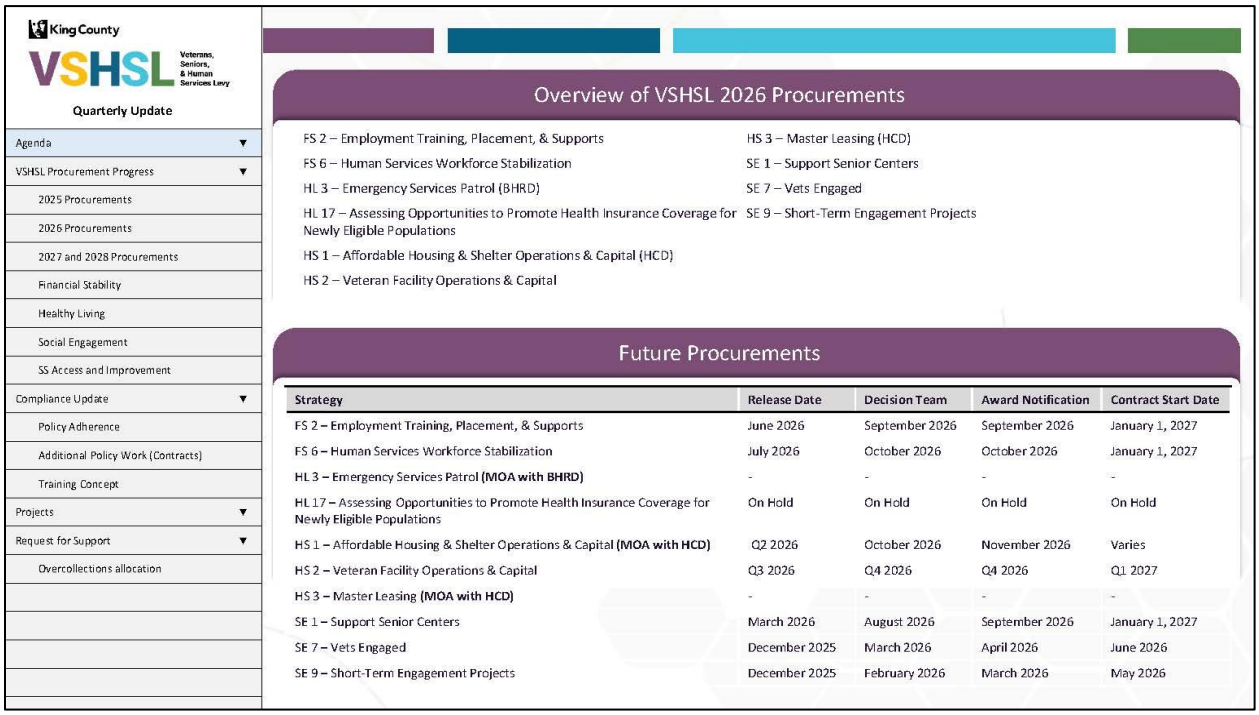
Overview of VSHSL 2025 Procurements

- FS 5 – Supporting Student Veterans and Their Families
- FS 6 – Human Services Workforce Stabilization
- HL 1 Behavioral Health Integration (PHSKC)
- HL 14 – Home-Based Services (PHSKC)
- HL 15 – Community-Based Parenting Supports (PHSKC)
- HS 1 – Affordable Housing & Shelter Operations & Capital (HCD)
- HS 9 – Forensic Integrated Care & Supportive Housing (BHRD)
- SE 7 – Vets Engaged
- SE 9 – Short-Term Engagement Projects
- TACB
- TACB Coalitions

Current Procurements

Strategy	Release Date	Decision Team	Award Notification
FS 2 – Employment Training, Placement, & Supports	June 2026	September 2026	September 2026
FS 6 – Human Services Workforce Stabilization	July 2026	October 2026	October 2026
HL 3 – Emergency Services Patrol **(MOA with BHRD)**	-	-	-
HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations	On Hold	On Hold	On Hold
HS 1 – Affordable Housing & Shelter Operations & Capital **(MOA with HCD)**	Q2 2026	October 2026	November 2026
HS 2 – Veteran Facility Operations & Capital	Q3 2026	Q4 2026	Q4 2026

Strategy	Release Date
TACB Coalitions	September 10, 2025
FS 6 – Human Services Workforce Stabilization (Round 2 – All DCHS)	September 16, 2025
HL 1 Behavioral Health Integration **(MOA with PHSKC)**	Q4 2025
HL 15 – Community-Based Parenting Supports **(MOA with PHSKC)**	October 2025



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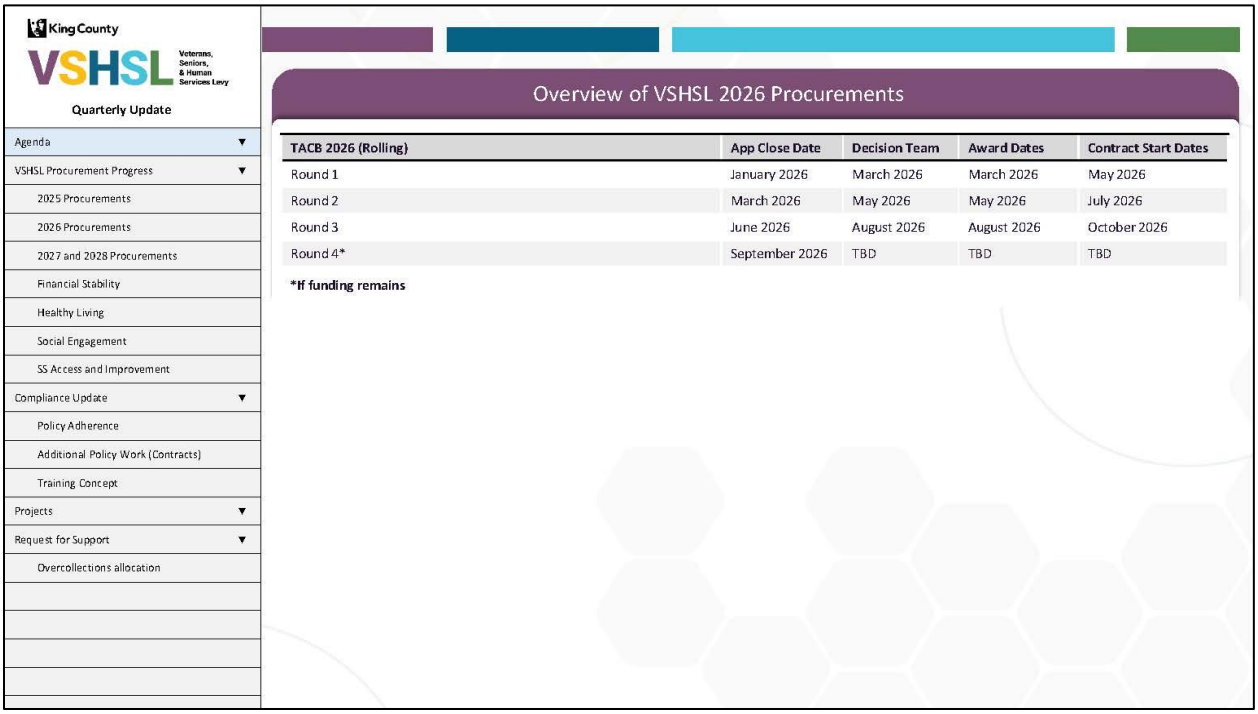
Overview of VSHSL 2026 Procurements

- FS 2 – Employment Training, Placement, & Supports
- FS 6 – Human Services Workforce Stabilization
- HL 3 – Emergency Services Patrol (BHRD)
- HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations
- HS 1 – Affordable Housing & Shelter Operations & Capital (HCD)
- HS 2 – Veteran Facility Operations & Capital
- HS 3 – Master Leasing (HCD)
- SE 1 – Support Senior Centers
- SE 7 – Vets Engaged
- SE 9 – Short-Term Engagement Projects

Future Procurements

Strategy	Release Date	Decision Team	Award Notification	Contract Start Date
FS 2 – Employment Training, Placement, & Supports	June 2026	September 2026	September 2026	January 1, 2027
FS 6 – Human Services Workforce Stabilization	July 2026	October 2026	October 2026	January 1, 2027
HL 3 – Emergency Services Patrol **(MOA with BHRD)**	-	-	-	-
HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations	On Hold	On Hold	On Hold	On Hold
HS 1 – Affordable Housing & Shelter Operations & Capital **(MOA with HCD)**	Q2 2026	October 2026	November 2026	Varies
HS 2 – Veteran Facility Operations & Capital	Q3 2026	Q4 2026	Q4 2026	Q1 2027
HS 3 – Master Leasing **(MOA with HCD)**	-	-	-	-
SE 1 – Support Senior Centers	March 2026	August 2026	September 2026	January 1, 2027
SE 7 – Vets Engaged	December 2025	March 2026	April 2026	June 2026
SE 9 – Short-Term Engagement Projects	December 2025	February 2026	March 2026	May 2026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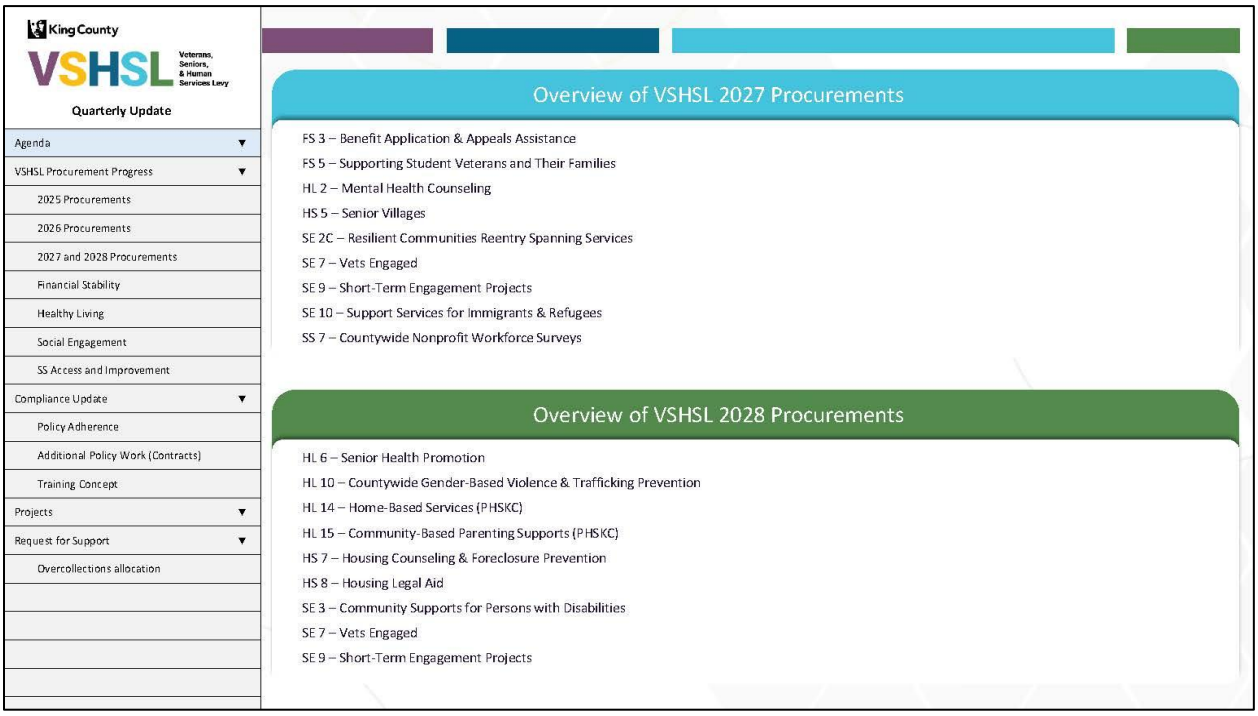
Overview of VSHSL 2026 Procurements
TACB 2026 (Rolling) | App Close Date | Decision Team | Award Dates | Contract Start Dates
Round 1 | January 2026 | March 2026 | March 2026 | May 2026
Round 2 | March 2026 | May 2026 | May 2026 | July 2026
Round 3 | June 2026 | August 2026 | August 2026 | October 2026
Round 4* | September 2026 | TBD | TBD | TBD
*If funding remains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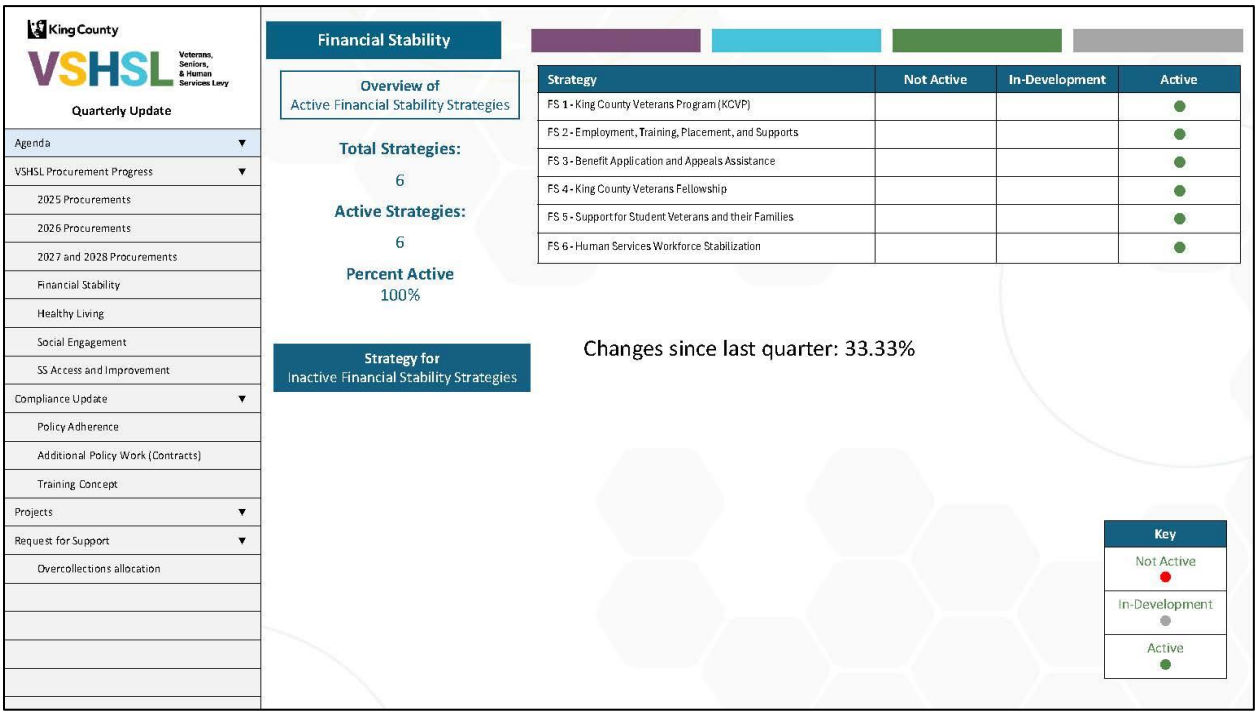
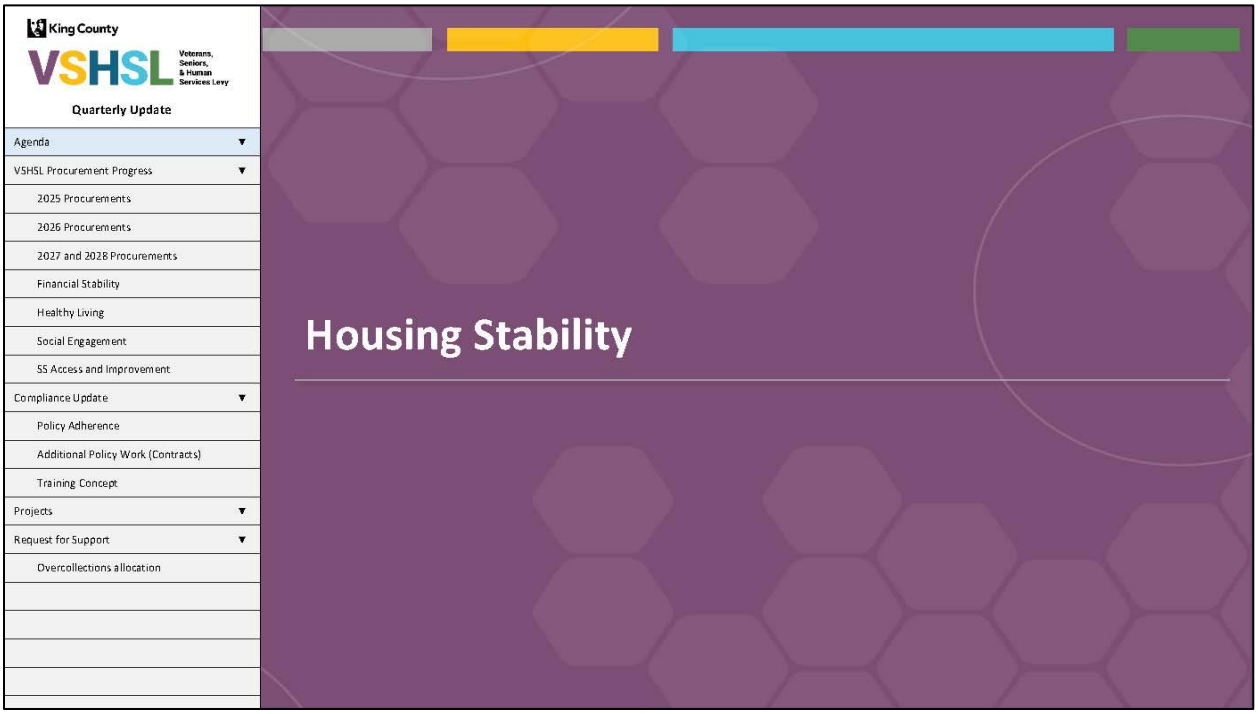
Overview of VSHSL 2027 Procurements
FS 3 – Benefit Application & Appeals Assistance
FS 5 – Supporting Student Veterans and Their Families
HL 2 – Mental Health Counseling
HS 5 – Senior Villages
SE 2C – Resilient Communities Reentry Spanning Services
SE 7 – Vets Engaged
SE 9 – Short-Term Engagement Projects
SE 10 – Support Services for Immigrants & Refugees
SS 7 – Countywide Nonprofit Workforce Surveys
Overview of VSHSL 2028 Procurements
HL 6 – Senior Health Promotion
HL 10 – Countywide Gender-Based Violence & Trafficking Prevention
HL 14 – Home-Based Services (PHSKC)
HL 15 – Community-Based Parenting Supports (PHSKC)
HS 7 – Housing Counseling & Foreclosure Prevention
HS 8 – Housing Legal Aid
SE 3 – Community Supports for Persons with Disabilities
SE 7 – Vets Engaged
SE 9 – Short-Term Engagement Projects



Strategy	Not Active	In-Development	Active
FS 1 - King County Veterans Program (KCVP)			●
FS 2 - Employment, Training, Placement, and Supports			●
FS 3 - Benefit Application and Appeals Assistance			●
FS 4 - King County Veterans Fellowship			●
FS 5 - Support for Student Veterans and their Families			●
FS 6 - Human Services Workforce Stabilization			●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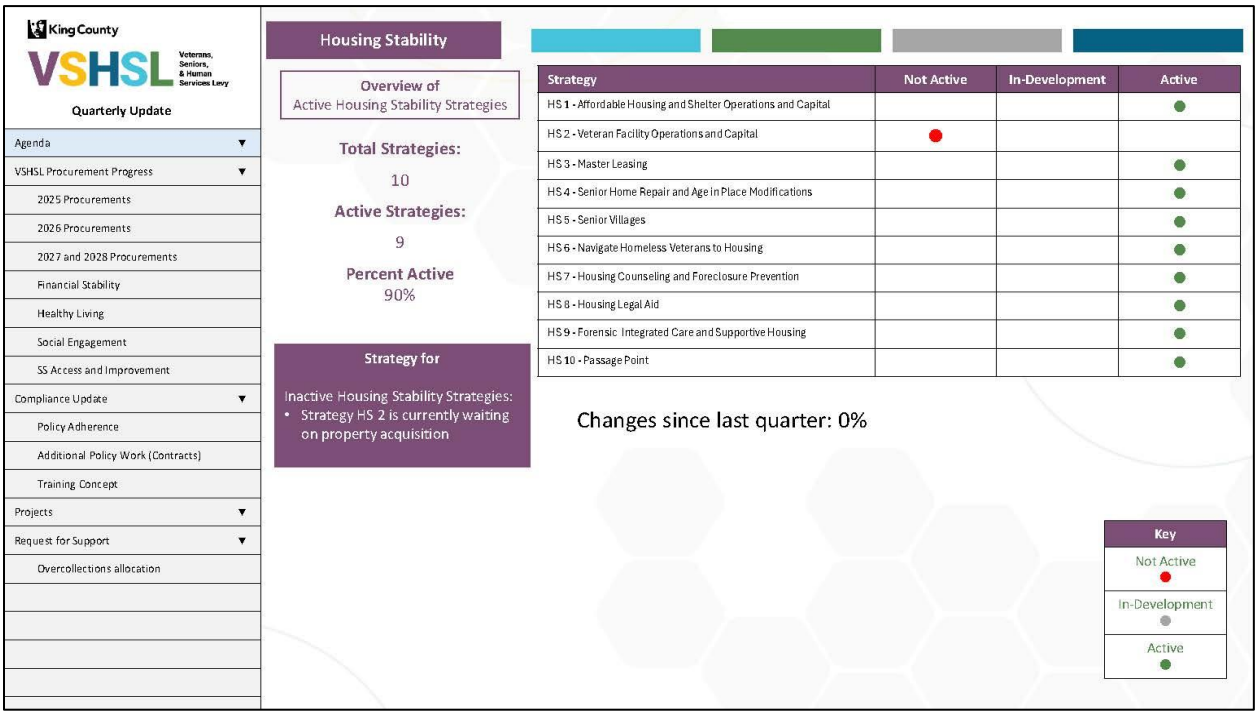
Housing Stability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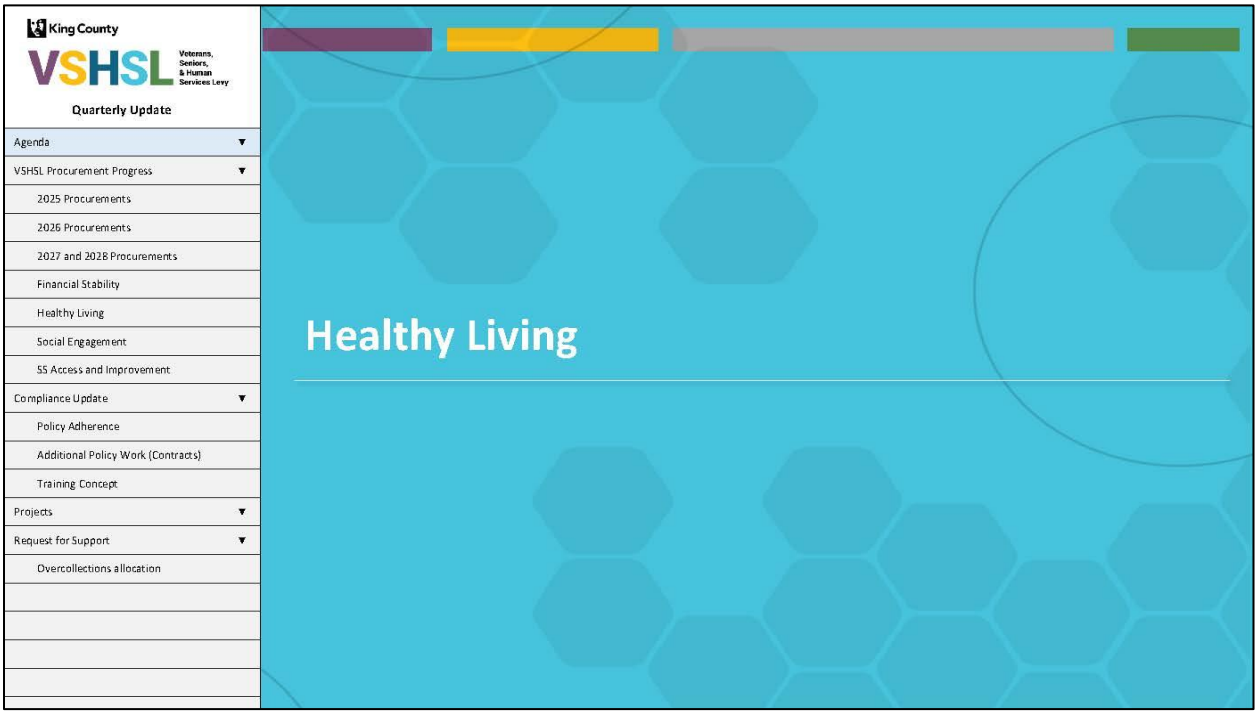
Housing Stability
Overview of Active Housing Stability Strategies
Total Strategies:
10
Active Strategies:
9
Percent Active
90%
Strategy for
Inactive Housing Stability Strategies:
• Strategy HS 2 is currently waiting on property acquisition
Strategy | Not Active | In-Development | Active
HS 1 - Affordable Housing and Shelter Operations and Capital | | | ●
HS 2 - Veteran Facility Operations and Capital | ● | |
HS 3 - Master Leasing | | | ●
HS 4 - Senior Home Repair and Age in Place Modifications | | | ●
HS 5 - Senior Villages | | | ●
HS 6 - Navigate Homeless Veterans to Housing | | | ●
HS 7 - Housing Counseling and Foreclosure Prevention | | | ●
HS 8 - Housing Legal Aid | | | ●
HS 9 - Forensic Integrated Care and Supportive Housing | | | ●
HS 10 - Passage Point | | | ●
Changes since last quarter: 0%
Key
Not Active
In-Development
Active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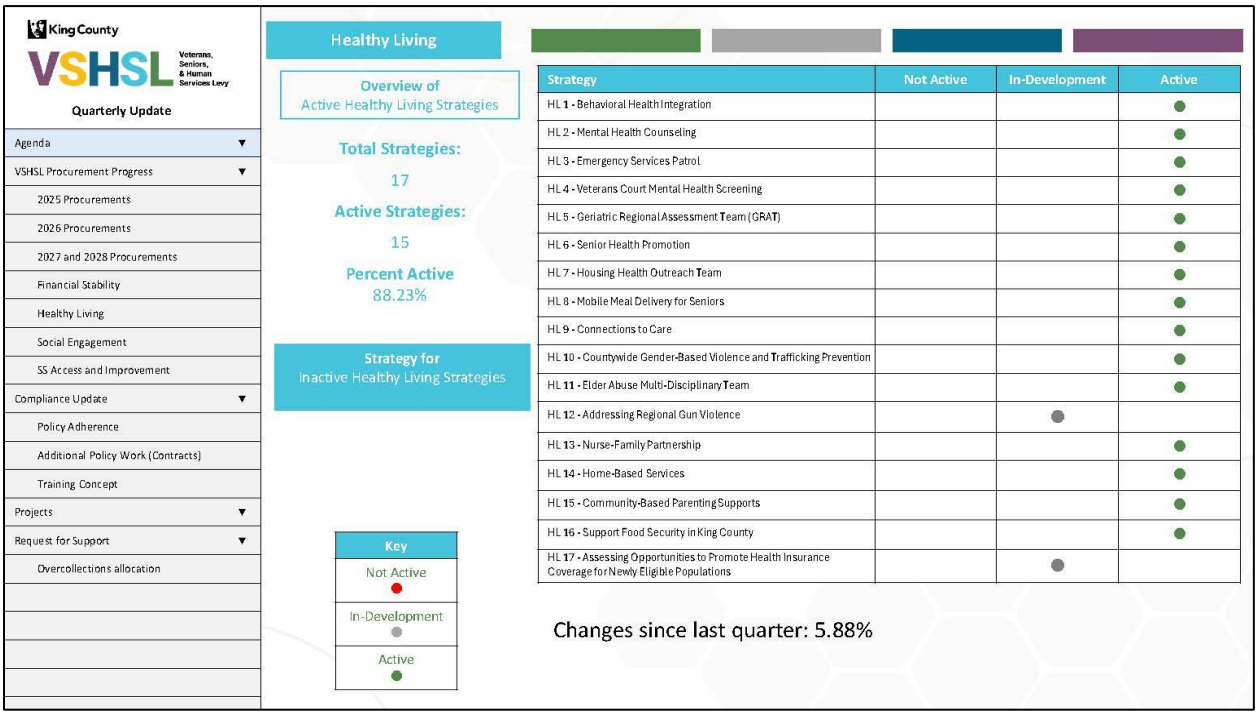
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Healthy Living
Overview of Active Healthy Living Strategies
Total Strategies:
17
Active Strategies:
15
Percent Active
88.23%
Strategy for Inactive Healthy Living Strategies
Key
Not Active
In-Development
Active
Strategy | Not Active | In-Development | Active
HL 1 - Behavioral Health Integration
HL 2 - Mental Health Counseling
HL 3 - Emergency Services Patrol
HL 4 - Veterans Court Mental Health Screening
HL 5 - Geriatric Regional Assessment Team (GRAT)
HL 6 - Senior Health Promotion
HL 7 - Housing Health Outreach Team
HL 8 - Mobile Meal Delivery for Seniors
HL 9 - Connections to Care
HL 10 - Countywide Gender-Based Violence and Trafficking Prevention
HL 11 - Elder Abuse Multi-Disciplinary Team
HL 12 - Addressing Regional Gun Violence
HL 13 - Nurse-Family Partnership
HL 14 - Home-Based Services
HL 15 - Community-Based Parenting Supports
HL 16 - Support Food Security in King County
HL 17 - Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations
Changes since last quarter: 5.88%

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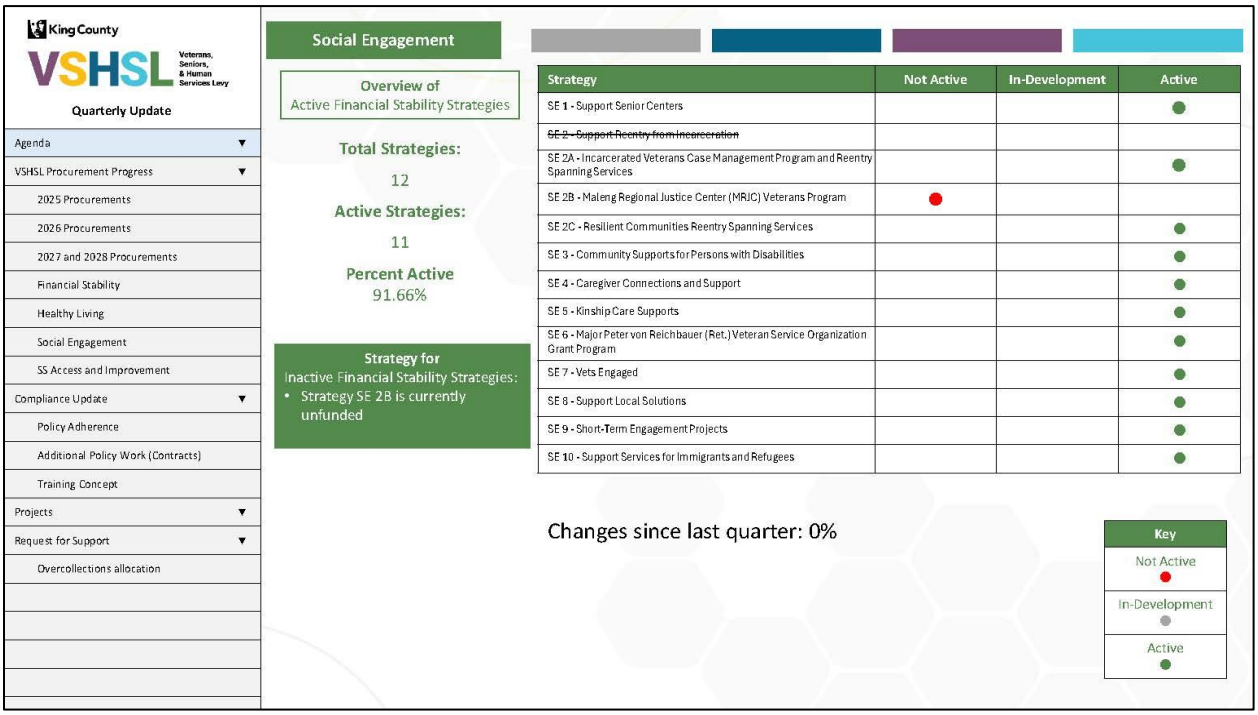
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Social Engagement
Overview of Active Financial Stability Strategies
Total Strategies:
12
Active Strategies:
11
Percent Active
91.66%
Strategy for Inactive Financial Stability Strategies:
• Strategy SE 2B is currently unfunded
Strategy
Not Active
In-Development
Active
SE 1 - Support Senior Centers
~~SE 2 - Support Reentry from Incarceration~~
SE 2A - Incarcerated Veterans Case Management Program and Reentry Spanning Services
SE 2B - Maleng Regional Justice Center (MRJC) Veterans Program
SE 2C - Resilient Communities Reentry Spanning Services
SE 3 - Community Supports for Persons with Disabilities
SE 4 - Caregiver Connections and Support
SE 5 - Kinship Care Supports
SE 6 - Major Peter von Reichbauer (Ret.) Veteran Service Organization Grant Program
SE 7 - Vets Engaged
SE 8 - Support Local Solutions
SE 9 - Short-Term Engagement Projects
SE 10 - Support Services for Immigrants and Refugees
Changes since last quarter: 0%
Key
Not Active
In-Development
Active

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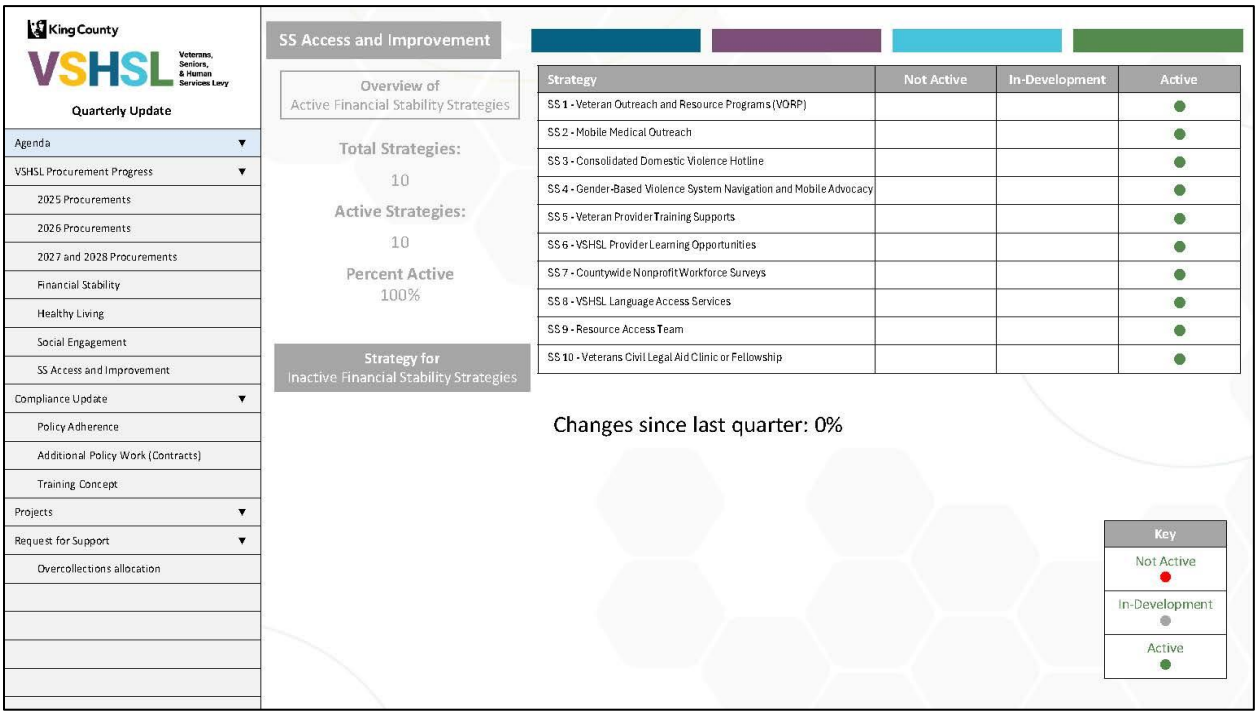
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SS Access and Improvement
Overview of Active Financial Stability Strategies
Total Strategies:
10
Active Strategies:
10
Percent Active
100%
Strategy for Inactive Financial Stability Strategies
Strategy
Not Active
In-Development
Active
SS 1 - Veteran Outreach and Resource Programs (VORP)
SS 2 - Mobile Medical Outreach
SS 3 - Consolidated Domestic Violence Hotline
SS 4 - Gender-Based Violence System Navigation and Mobile Advocacy
SS 5 - Veteran Provider Training Supports
SS 6 - VSHSL Provider Learning Opportunities
SS 7 - Countywide Nonprofit Workforce Surveys
SS 8 - VSHSL Language Access Services
SS 9 - Resource Access Team
SS 10 - Veterans Civil Legal Aid Clinic or Fellowship
Changes since last quarter: 0%
Key
Not Active
In-Development
Active

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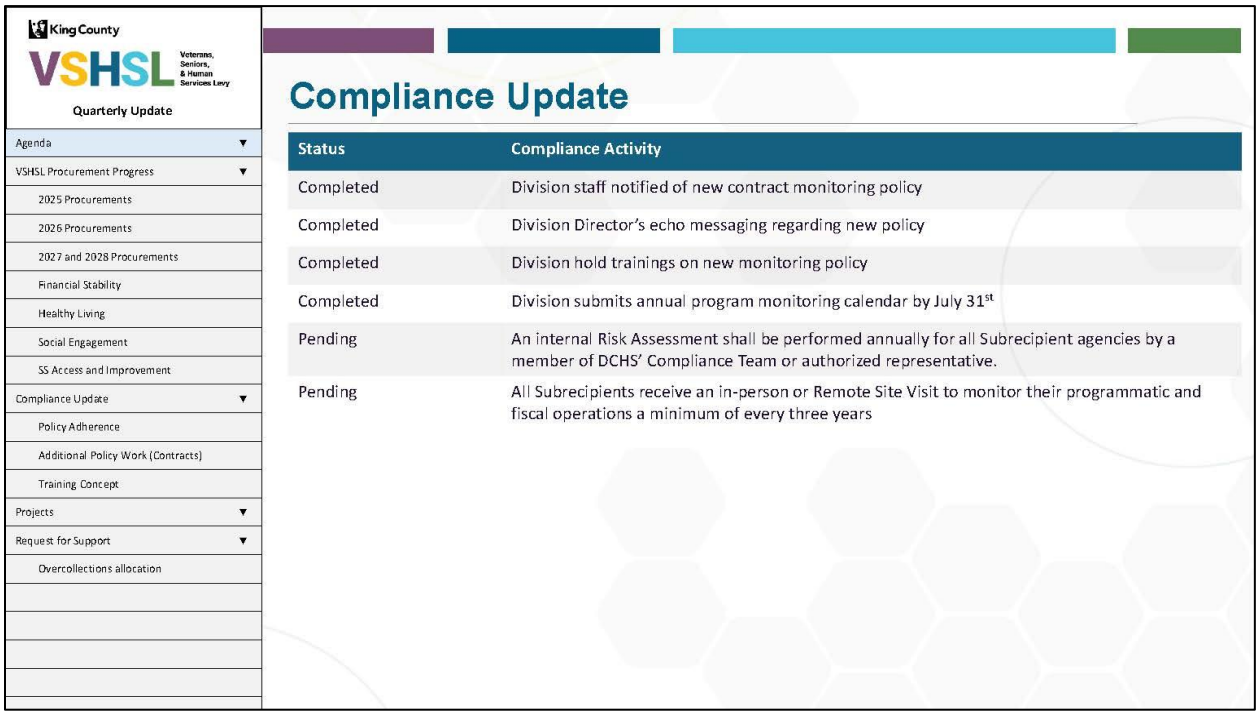
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Compliance Update
Status
Compliance Activity
Completed
Division staff notified of new contract monitoring policy
Completed
Division Director's echo messaging regarding new policy
Completed
Division hold trainings on new monitoring policy
Completed
Division submits annual program monitoring calendar by July 31st
Pending
An internal Risk Assessment shall be performed annually for all Subrecipient agencies by a member of DCHS' Compliance Team or authorized representative.
Pending
All Subrecipients receive an in-person or Remote Site Visit to monitor their programmatic and fiscal operations a minimum of every three years

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Compliance Update

Status	Additional Activity
Completed	Development of pre-vendor assessment, risk calculator, and recommended risk mitigation strategies
Completed	Development of pre-vendor intake survey
In-Progress	Piloting of pre-vendor intake survey and pre-vendor assessment
Pending	Stagging of contract administration policies
Pending	Scheduled meeting with C&P to share desired contract administration chapters and policies
Pending	Stagging of contract administration training modules in articulate
Complete	Stagging of fraud detection and prevention training (proof of concept) in articulate

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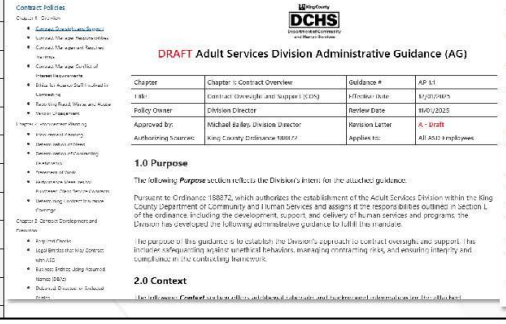
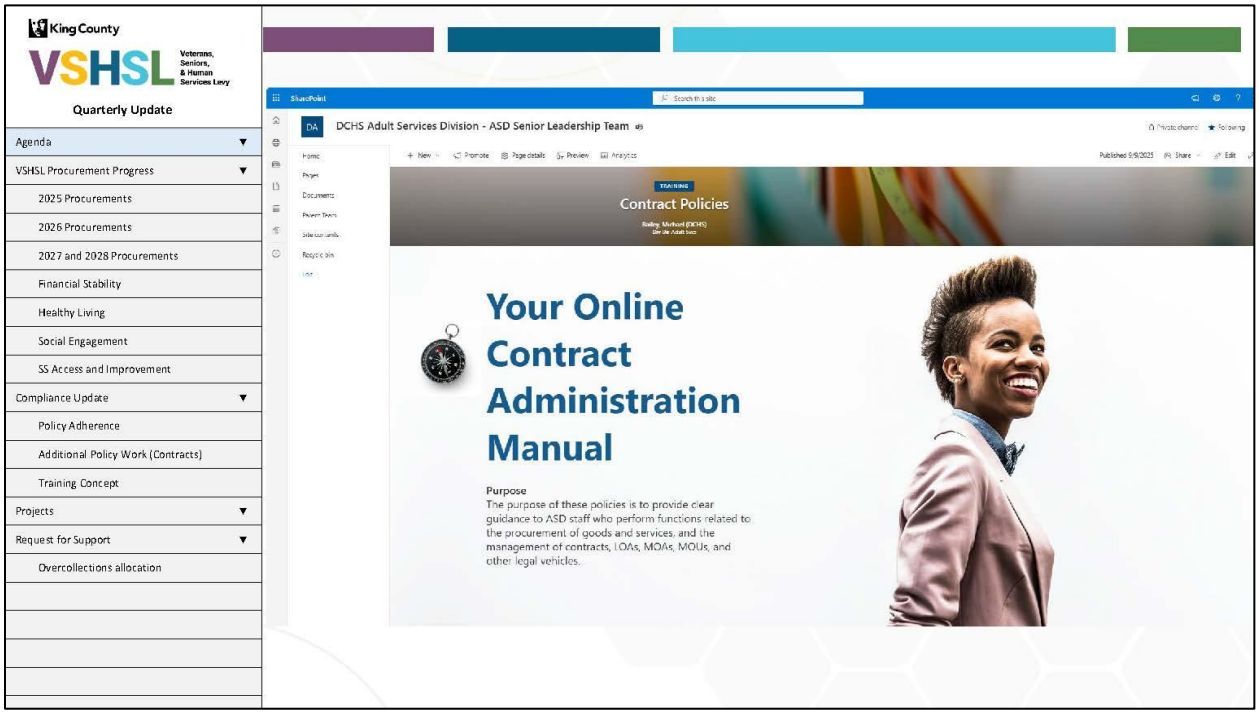
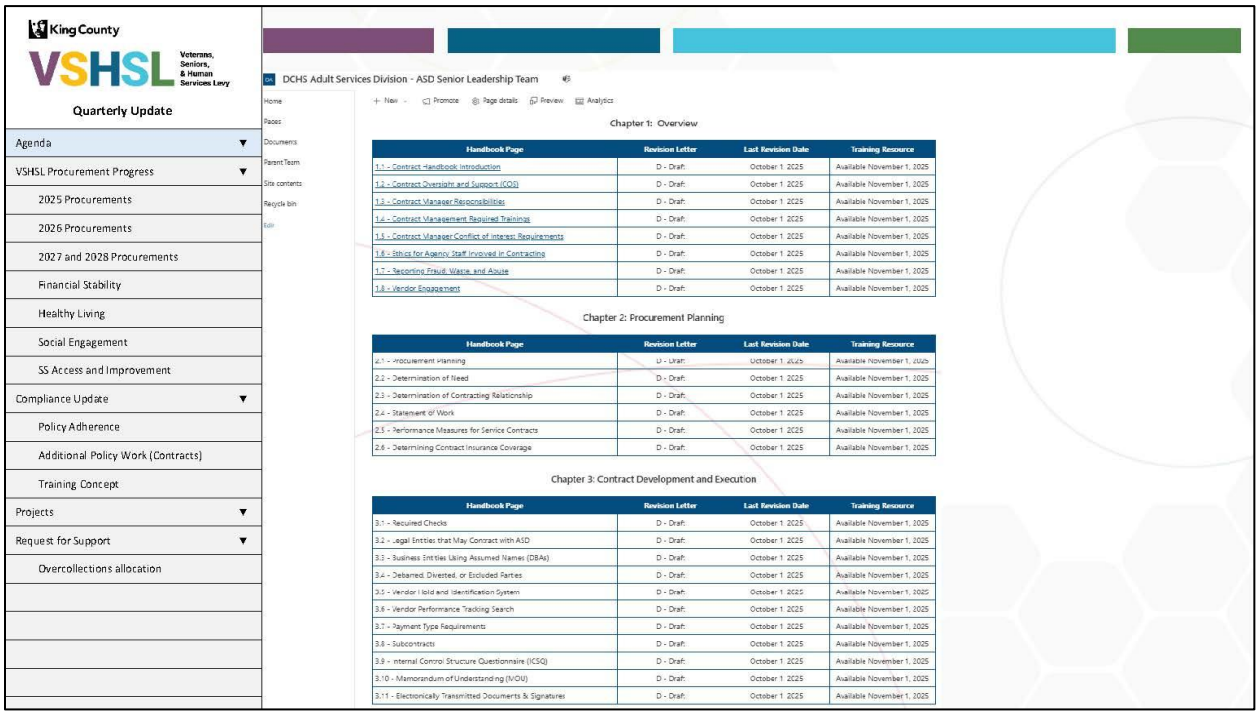
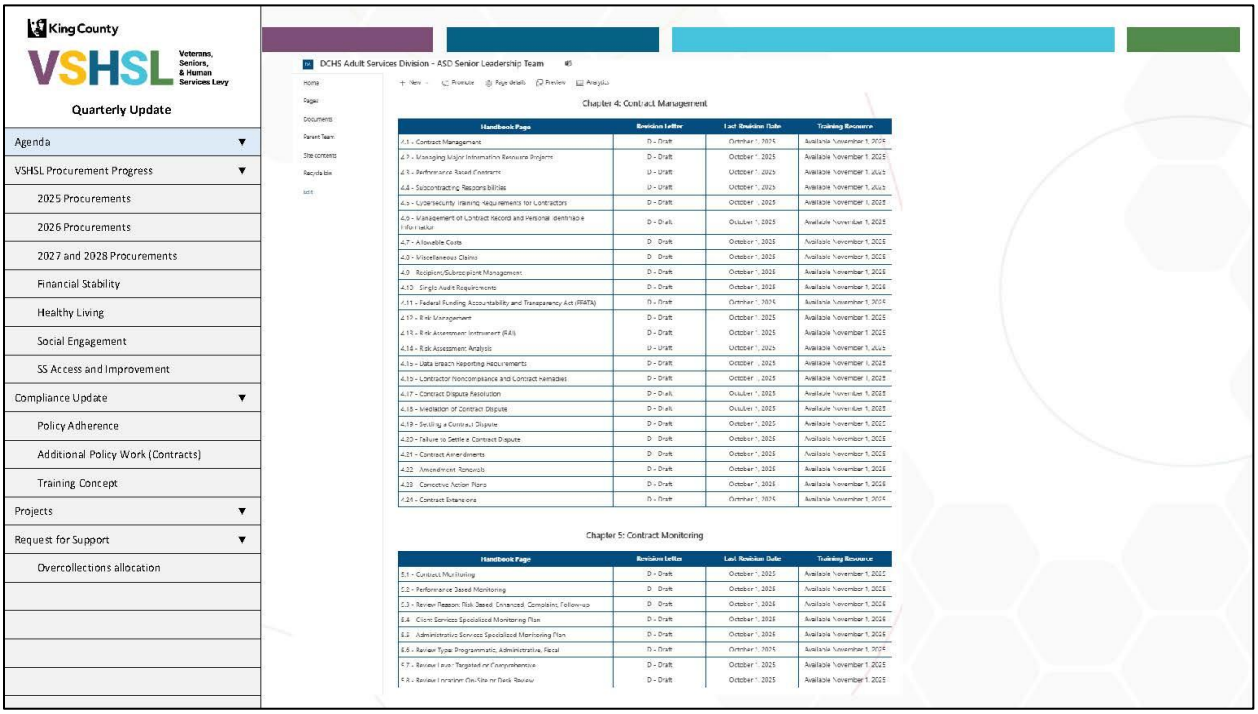






Report one of two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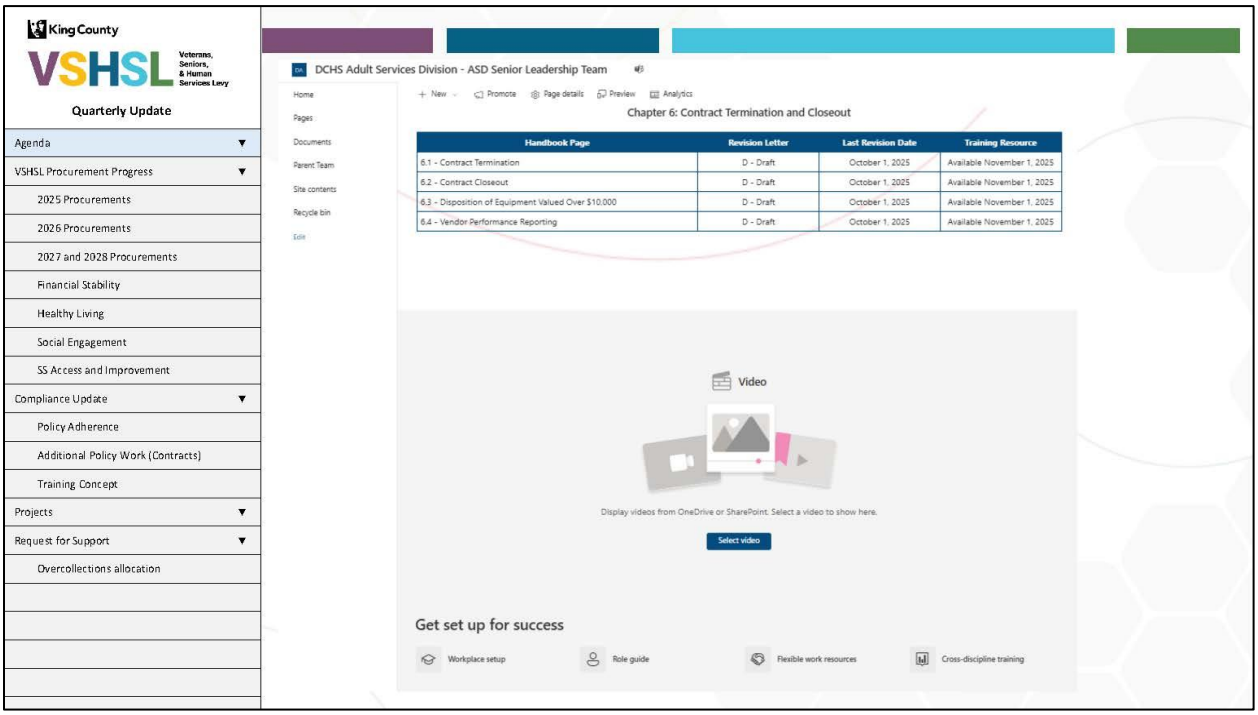
DCHS Adult Services Division - ASD Senior Leadership Team
Chapter 4: Contract Management
Handbook Page
Revision Letter
Last Revision Date
Training Resource
Chapter 5: Contract Monitoring
Handbook Page
Revision Letter
Last Revision Date
Training Resource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DCHS Adult Services Division - ASD Senior Leadership Team
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Parent Team
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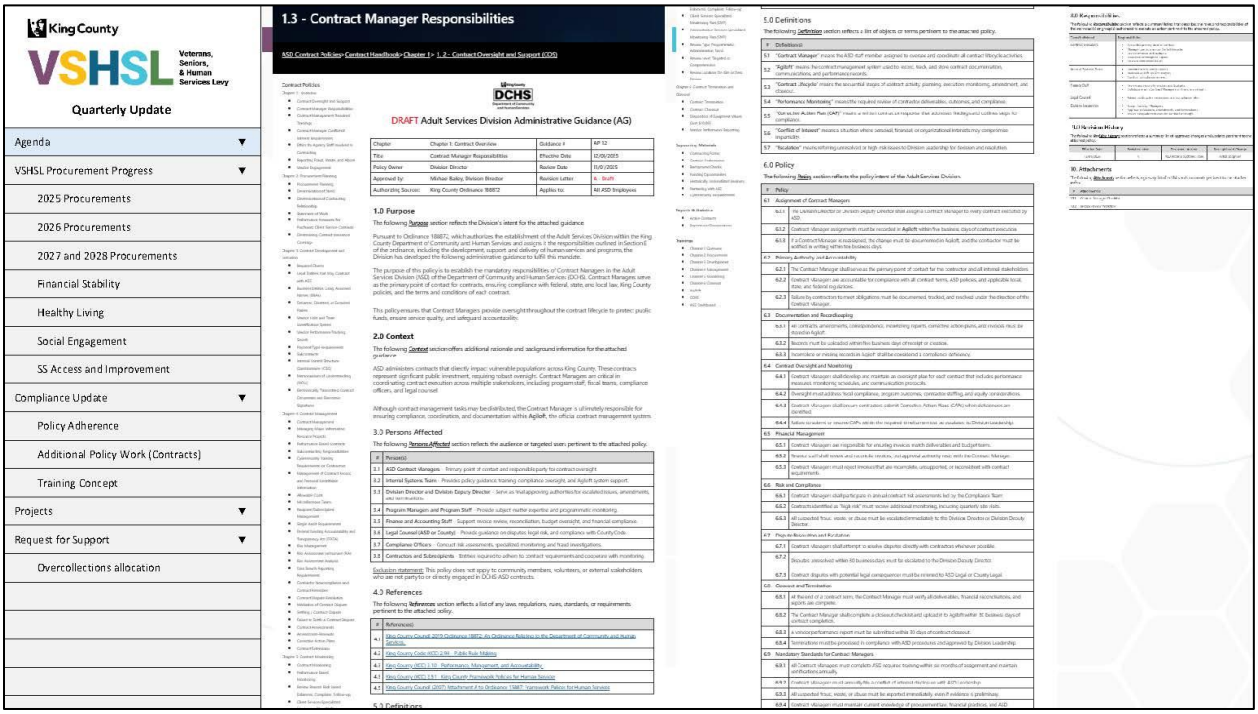
Recycle bin
Edit
New
Promote
Page details
Preview
Analytics
Chapter 6: Contract Termination and Closeout
Handbook Page
Revision Letter
Last Revision Date
Training Resource
6.1 - Contract Termination
D - Draft
October 1, 2025
Available November 1, 2025
6.2 - Contract Closeout
D - Draft
October 1, 2025
Available November 1, 2025
6.3 - Disposition of Equipment Valued Over $10,000
D - Draft
October 1, 2025
Available November 1, 2025
6.4 - Vendor Performance Reporting
D - Draft
October 1, 2025
Available November 1, 2025
Video
Display videos from OneDrive or SharePoint. Select a video to show here.
Select video
Get set up for success
Workplace setup
Role guide
Flexible work resources
Cross-discipline training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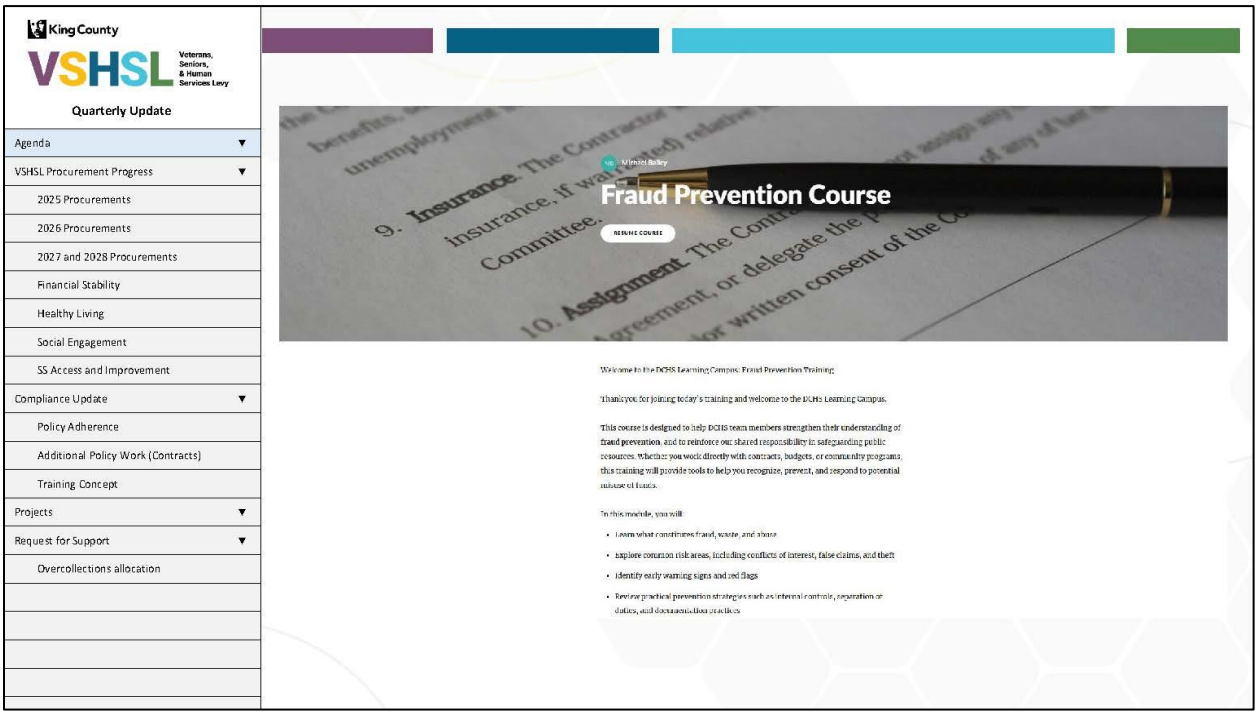
1.3 - Contract Manager Responsibilities
DRAFT Adult Services Division Administrative Guidance (AG)
1.0 Purpose
2.0 Context
3.0 Persons Affected
4.3 References
5.0 Definitions
6.0 Policy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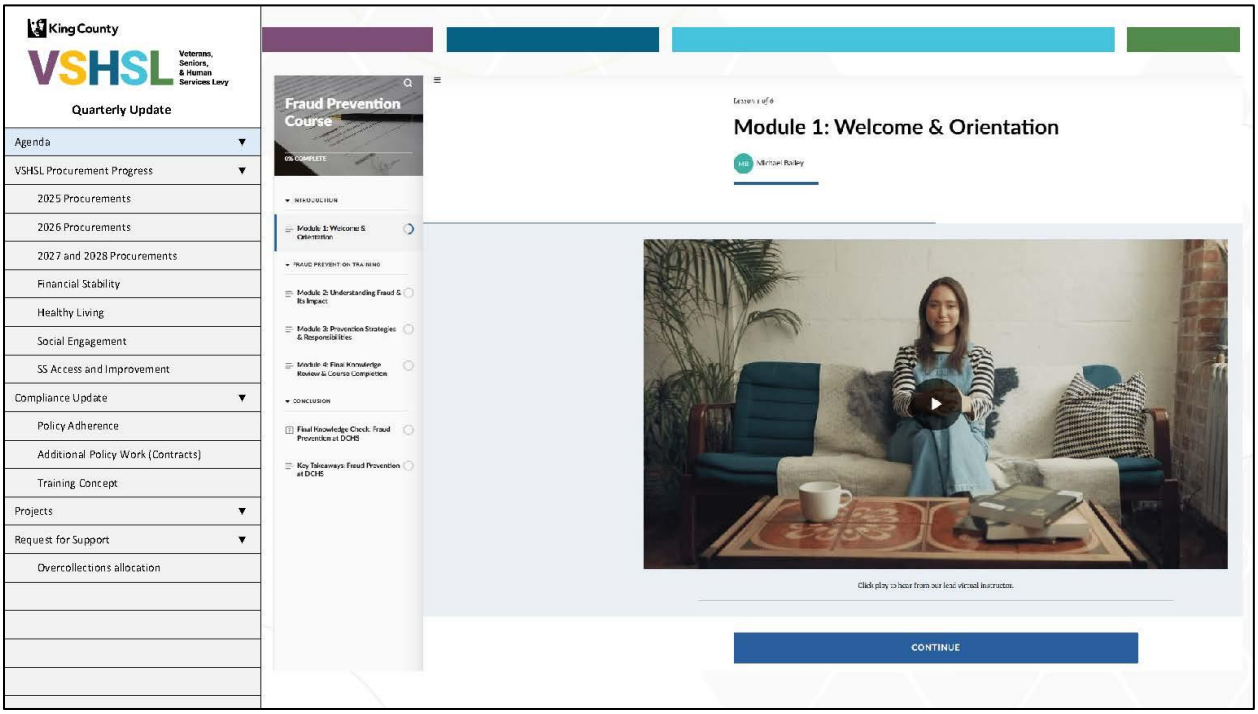
Fraud Prevention Course
RESUME COURSE
Welcome to the DCHS Learning Campus: Fraud Prevention Training
Thank you for joining today's training and welcome to the DCHS Learning Campus.
This course is designed to help DCHS team members strengthen their understanding of fraud prevention, and to reinforce our shared responsibility in safeguarding public resources. Whether you work directly with contracts, budgets, or community programs, this training will provide tools to help you recognize, prevent, and respond to potential misuse of funds.
In this module, you will:
Learn what constitutes fraud, waste, and abuse
Explore common risk areas, including conflicts of interest, false claims, and theft
Identify early warning signs and red flags
Review practical prevention strategies such as internal controls, separation of duties, and documentation practices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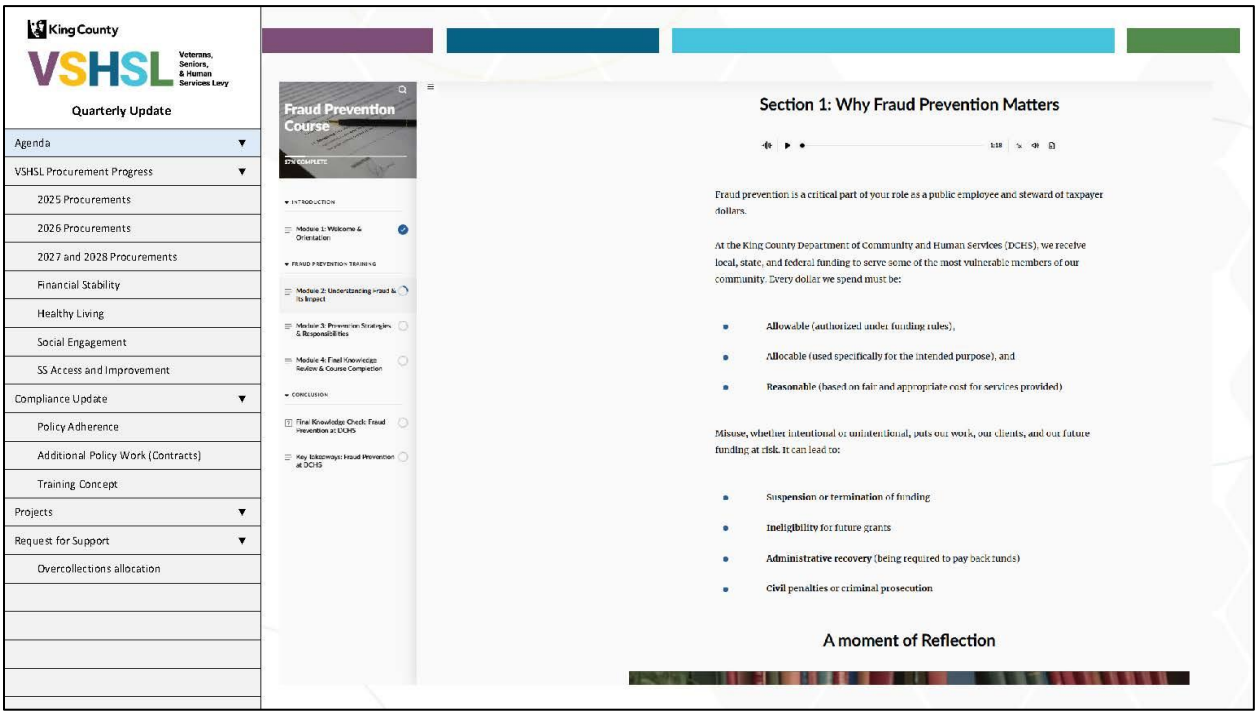
Module 1: Welcome & Orientation
CONTINUE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Fraud Prevention Course
Section 1: Why Fraud Prevention Matters
Fraud prevention is a critical part of your role as a public employee and steward of taxpayer dollars.
At the King County Department of Community and Human Services (DCHS), we receive local, state, and federal funding to serve some of the most vulnerable members of our community. Every dollar we spend must be:
Allowable (authorized under funding rules),
Allocable (used specifically for the intended purpose), and
Reasonable (based on fair and appropriate cost for services provided)
Misuse, whether intentional or unintentional, puts our work, our clients, and our future funding at risk. It can lead to:
Suspension or termination of funding
Ineligibility for future grants
Administrative recovery (being required to pay back funds)
Civil penalties or criminal prosecution
A moment of Reflection

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Annual Report Preview

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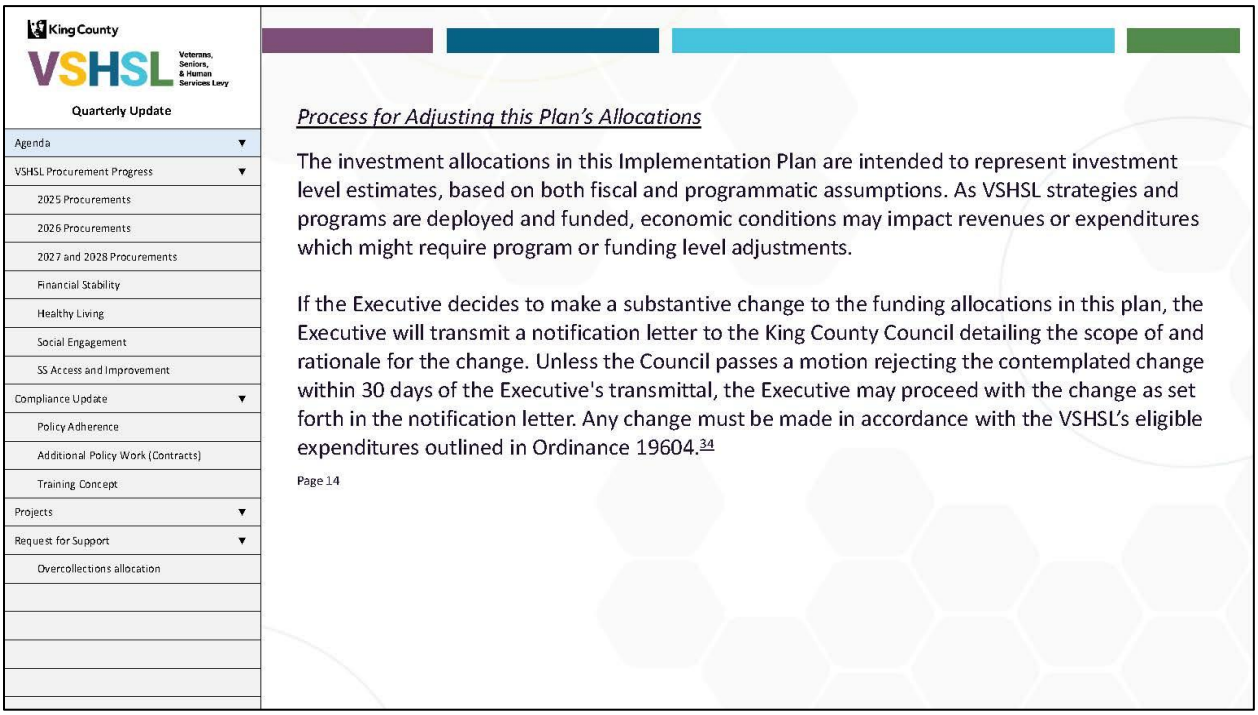
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Process for Adjusting this Plan's Allocations
The investment allocations in this Implementation Plan are intended to represent investment level estimates, based on both fiscal and programmatic assumptions. As VSHSL strategies and programs are deployed and funded, economic conditions may impact revenues or expenditures which might require program or funding level adjustments.
If the Executive decides to make a substantive change to the funding allocations in this plan, the Executive will transmit a notification letter to the King County Council detailing the scope of and rationale for the change. Unless the Council passes a motion rejecting the contemplated change within 30 days of the Executive's transmittal, the Executive may proceed with the change as set forth in the notification letter. Any change must be made in accordance with the VSHSL's eligible expenditures outlined in Ordinance 19604.34
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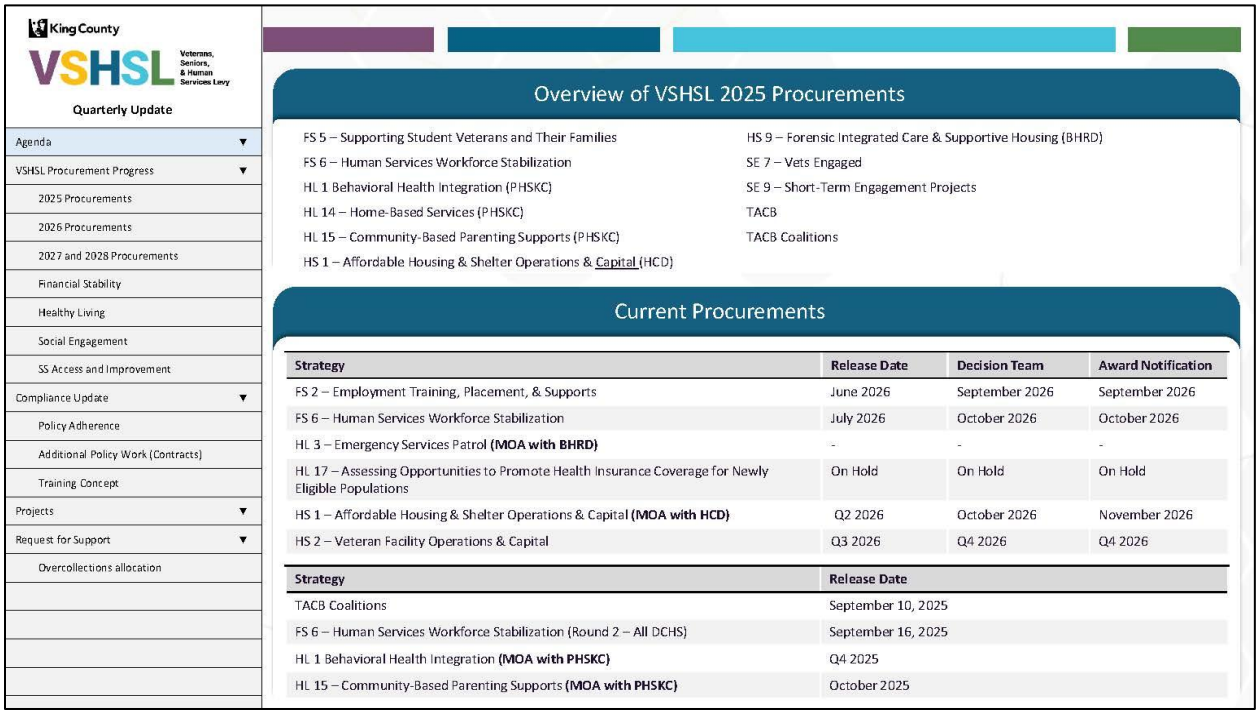
VSHSL Overview and Commitments

- ☐ Check-in: What are you hoping to get out of today's meeting
- ☐ VSHSL Procurement Progress
- ☐ Compliance Updates
- ☐ Upcoming Reports
- ☐ Projects In the Hopper
- ☐ Request for Support

Team Impact Goals For CY 2025 - 2026

	OCT-25	NOV-25	DEC-25	JAN-26	FEB-25	MAR-25	APR-25
Division Director's Office							
By December 31, 2026, advance community well-being by aligning its work with the Human Services Principles, ensuring services are delivered with equity, dignity, and effectiveness.			✓				
By March 31, 2026, develop a strategic plan that ensures effective implementation and drives improved outcomes for communities across King County.							✓
By December 31, 2025, strengthen community impact by hosting an annual summit that informs and connects funders, providers, partners, and residents, and by fostering a leadership culture committed to improving outcomes.			✓				
By December 31, 2025, advance equity and service continuity by establishing a documented plan to become a more anti-racist, multicultural organization and securing an approved budget that sustains vital community services.			✓				
King County Veterans Program (KCVP)							
By December 31, 2025, address financial assistance shortfalls and ensure long-term sustainability through reallocations, monitoring, and forward-looking planning informed by policy changes.			✓				
By December 31, 2025, improve operational efficiency by revising the KCVP Policy and Procedures manual, resolving AP delays, and completing a strategic team restructure plan.			✓				
By December 31, 2025, strengthen systems coordination by deepening partner collaboration and preparing a Veterans Housing Summit.			✓				
By December 31, 2025, expand housing by advancing transitional housing in partnership with Veterans Initiative team and increasing shelter availability for veterans with limited current options.			✓				
King County Veterans Initiatives Team							
By December 31, 2025, expand individualized support for criminal/legal-involved veterans to improve re-entry outcomes and reduce recidivism.			✓				
By December 31, 2025, strengthen partnerships with the criminal legal system and veteran-serving organizations to improve continuity of care.			✓				
By December 31, 2025, improve system governance and collaboration by staffing the King County Veterans Homelessness Committee and coordinating efforts across regional, state, and federal partners.			✓				
By December 31, 2025, improve housing stability for veterans experiencing homelessness by managing shelter investments and advancing performance-based contracting.			✓				
Policy and Community Engagement Team							
By December 31, 2025, enhance transparency and awareness by producing quarterly reports on community insights and service conditions, clarifying provider coverage with CIT and OPS, and tracking key policy activities across King County.			✓				
By December 31, 2025, strengthen communication and visibility by consistently sharing stories, event updates, news, and external engagement highlights to enhance community awareness and learning.			✓				
By December 31, 2025, advance equitable engagement by promoting ASD events, leading targeted planning sessions for procurements, and strengthening collaboration with county peers.			✓				
By December 31, 2025, expand outreach and visibility by attending events countywide, strengthening presence in new cities and priority populations, hosting staffed booths, and proactively planning engagement.			✓				
Community Investments & Operations Team							
By March 31, 2026, advance strategic coordination and provider engagement by conducting four in-person team retreats, facilitating cross-agency collaboration for all staff, and ensuring that each provider receives an in-person site visit.						✓	
By March 31, 2026, implement a coordinated, risk-informed program monitoring schedule for all VSHSL contracts, including the development of aligned tools and processes, timely notice to providers, and submission of a three-year monitoring plan.						✓	
By December 31, 2025, strengthen contract oversight and accountability by developing and submitting updated monitoring tools and processes to ASD leadership (including quarterly check-ins, invoice review, and tailored monitoring approaches).			✓				
By December 31, 2025, strengthen procurement-to-contract transitions by implementing a vendor intake assessment for all new awardees, developing a contract distribution plan for new funding initiatives, incorporating team feedback.			✓				
Internal Systems Team							
By December 31, 2025, develop a comprehensive plan to increase transparency by outlining strategies for clearly communicating how VSHSL funds, and associated ASD-funded positions, are being used to improve conditions for King County residents.			✓				
By December 31, 2025, enhance community impact by continuing to leverage best practices , implementing continuous improvement frameworks, and strengthening customer service across all programs and services.			✓				
By December 31, 2025, invest in staff development and well-being to ensure a well-trained , fulfilled workforce that delivers high-quality services and positive outcomes for the community.			✓				
By December 31, 2025, strengthen fiscal stewardship and risk management to ensure that external auditors have no cause to recommend modification or discontinuation of VSHSL administration.			✓				
Resource Access Team							
By December 31, 2025, community connection and service navigation by launching the ESRT program, delivering Resource Access Fairs in four districts, establishing district-level referral benchmarks, and finalizing braided funding plan to sustain the ERT.			✓				
By December 31, 2025, community members will have access to Resource Access Fairs in at least 50% of King County Council districts, expanding equitable connections to services and supports across the region.			✓				
By December 31, 2025, the Resource Access Team will increase its regional reach by engaging 25% more community members and 50% more cities compared to 2024, strengthening connections to services across King County.			✓				
By December 31, 2025, community members in all nine King County Council districts will benefit from direct engagement with the Resource Access Team, ensuring countywide access to services and supports.			✓				



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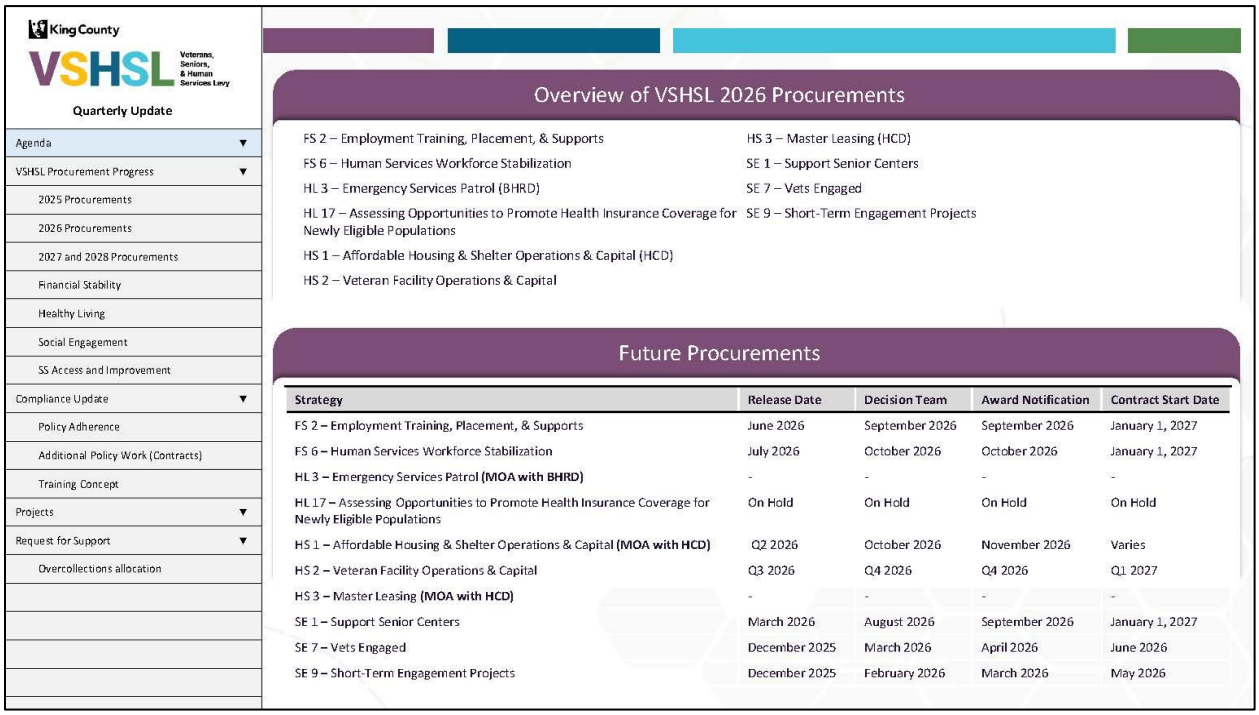
Overview of VSHSL 2025 Procurements

- FS 5 – Supporting Student Veterans and Their Families
- FS 6 – Human Services Workforce Stabilization
- HL 1 Behavioral Health Integration (PHSKC)
- HL 14 – Home-Based Services (PHSKC)
- HL 15 – Community-Based Parenting Supports (PHSKC)
- HS 1 – Affordable Housing & Shelter Operations & Capital (HCD)
- HS 9 – Forensic Integrated Care & Supportive Housing (BHRD)
- SE 7 – Vets Engaged
- SE 9 – Short-Term Engagement Projects
- TACB
- TACB Coalitions

Current Procurements

Strategy	Release Date	Decision Team	Award Notification
FS 2 – Employment Training, Placement, & Supports	June 2026	September 2026	September 2026
FS 6 – Human Services Workforce Stabilization	July 2026	October 2026	October 2026
HL 3 – Emergency Services Patrol **(MOA with BHRD)**	-	-	-
HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations	On Hold	On Hold	On Hold
HS 1 – Affordable Housing & Shelter Operations & Capital **(MOA with HCD)**	Q2 2026	October 2026	November 2026
HS 2 – Veteran Facility Operations & Capital	Q3 2026	Q4 2026	Q4 2026

Strategy	Release Date
TACB Coalitions	September 10, 2025
FS 6 – Human Services Workforce Stabilization (Round 2 – All DCHS)	September 16, 2025
HL 1 Behavioral Health Integration **(MOA with PHSKC)**	Q4 2025
HL 15 – Community-Based Parenting Supports **(MOA with PHSKC)**	October 2025



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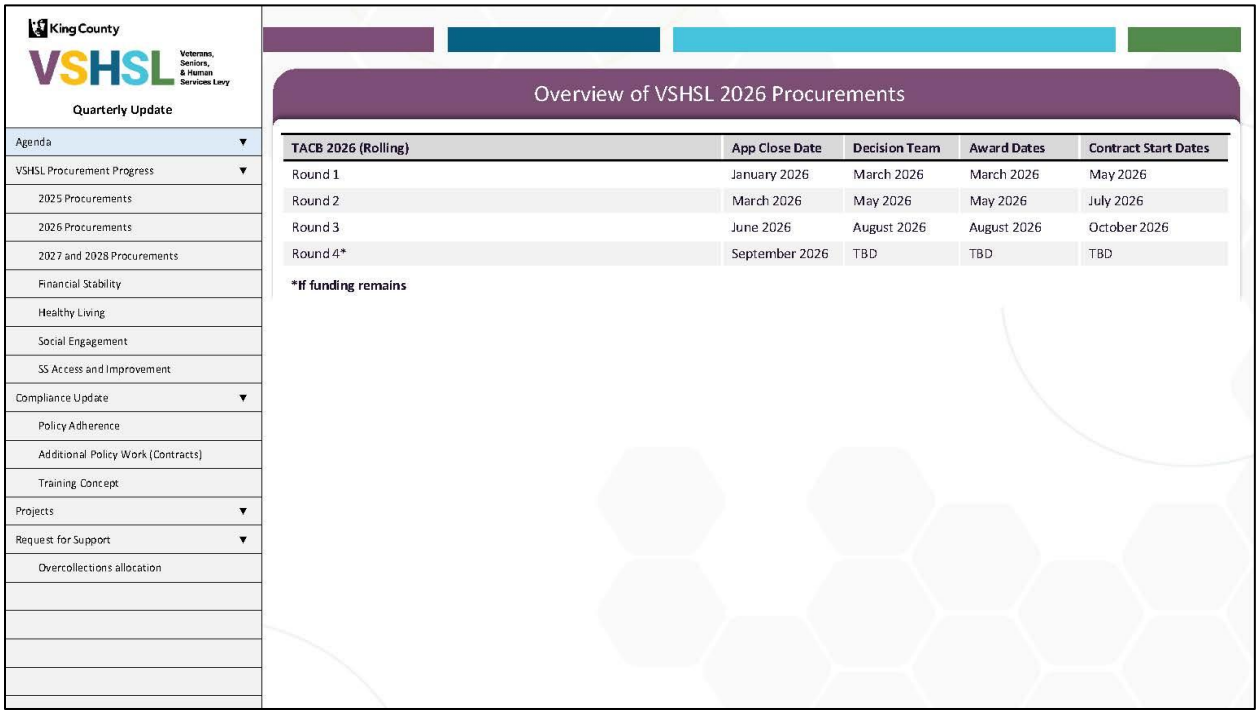
Overview of VSHSL 2026 Procurements

- FS 2 – Employment Training, Placement, & Supports
- FS 6 – Human Services Workforce Stabilization
- HL 3 – Emergency Services Patrol (BHRD)
- HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations
- HS 1 – Affordable Housing & Shelter Operations & Capital (HCD)
- HS 2 – Veteran Facility Operations & Capital
- HS 3 – Master Leasing (HCD)
- SE 1 – Support Senior Centers
- SE 7 – Vets Engaged
- SE 9 – Short-Term Engagement Projects

Future Procurements

Strategy	Release Date	Decision Team	Award Notification	Contract Start Date
FS 2 – Employment Training, Placement, & Supports	June 2026	September 2026	September 2026	January 1, 2027
FS 6 – Human Services Workforce Stabilization	July 2026	October 2026	October 2026	January 1, 2027
HL 3 – Emergency Services Patrol **(MOA with BHRD)**	-	-	-	-
HL 17 – Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations	On Hold	On Hold	On Hold	On Hold
HS 1 – Affordable Housing & Shelter Operations & Capital **(MOA with HCD)**	Q2 2026	October 2026	November 2026	Varies
HS 2 – Veteran Facility Operations & Capital	Q3 2026	Q4 2026	Q4 2026	Q1 2027
HS 3 – Master Leasing **(MOA with HCD)**	-	-	-	-
SE 1 – Support Senior Centers	March 2026	August 2026	September 2026	January 1, 2027
SE 7 – Vets Engaged	December 2025	March 2026	April 2026	June 2026
SE 9 – Short-Term Engagement Projects	December 2025	February 2026	March 2026	May 2026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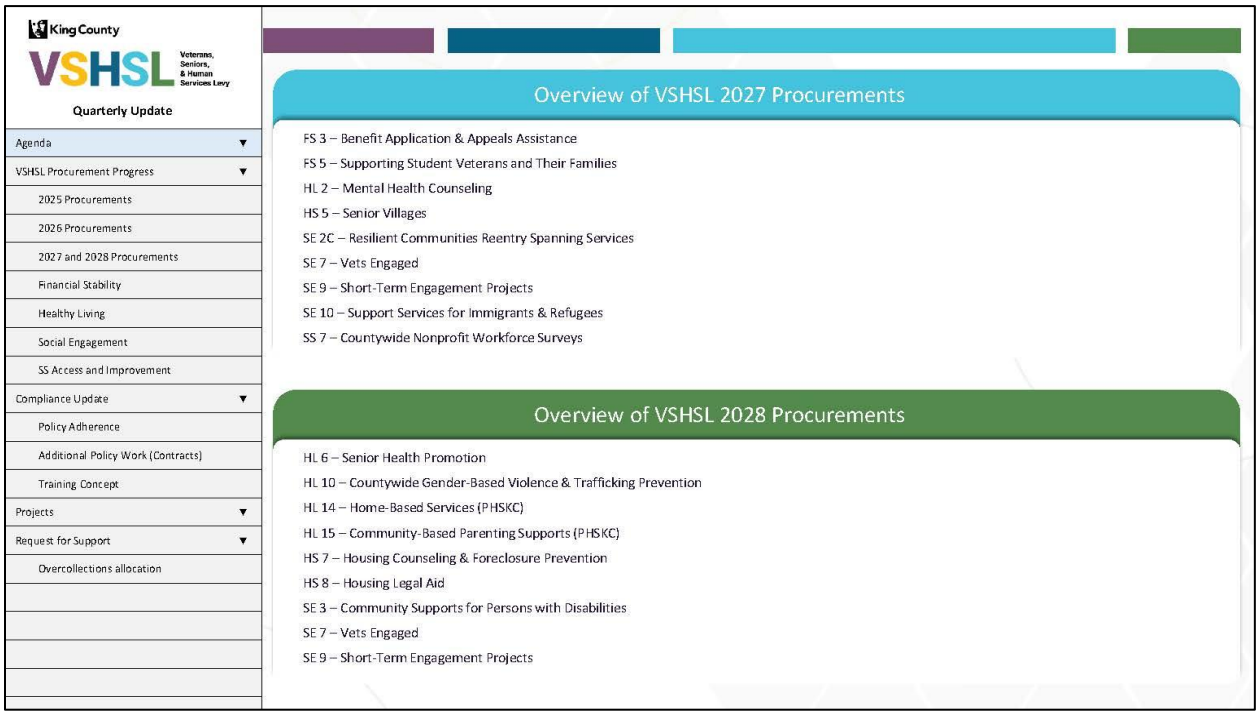
Overview of VSHSL 2026 Procurements
TACB 2026 (Rolling) | App Close Date | Decision Team | Award Dates | Contract Start Dates
Round 1 | January 2026 | March 2026 | March 2026 | May 2026
Round 2 | March 2026 | May 2026 | May 2026 | July 2026
Round 3 | June 2026 | August 2026 | August 2026 | October 2026
Round 4* | September 2026 | TBD | TBD | TBD
*If funding remains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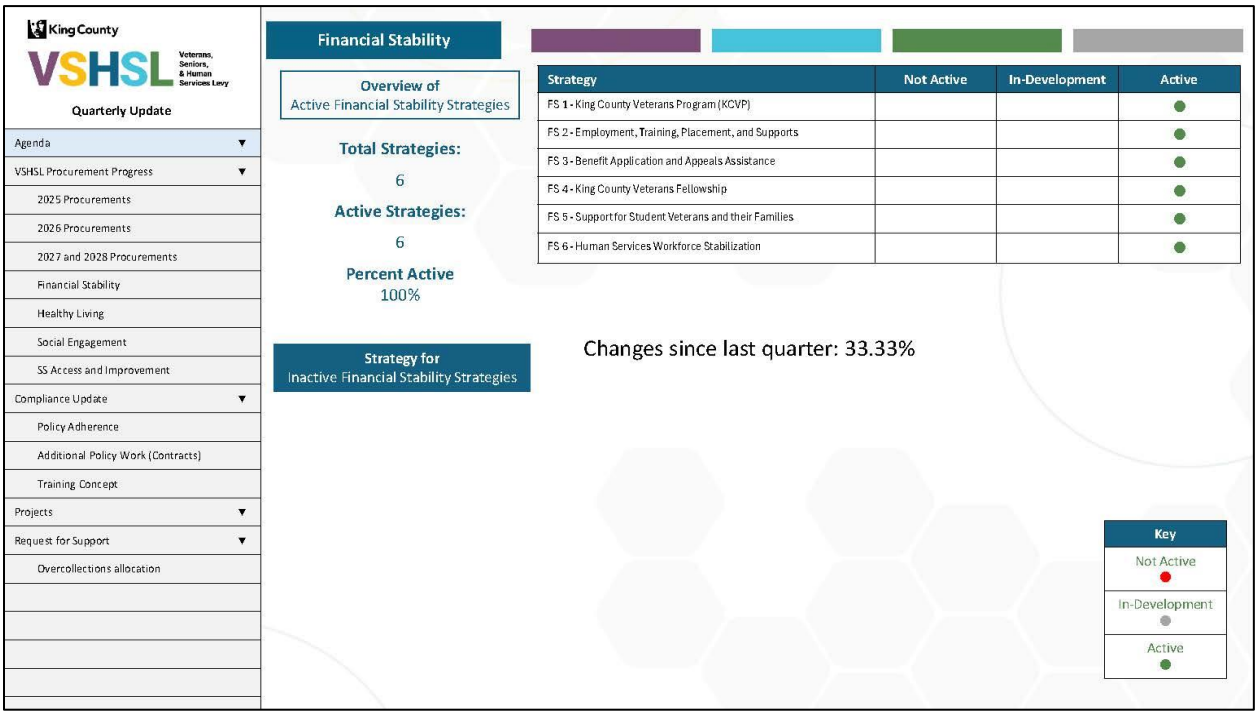
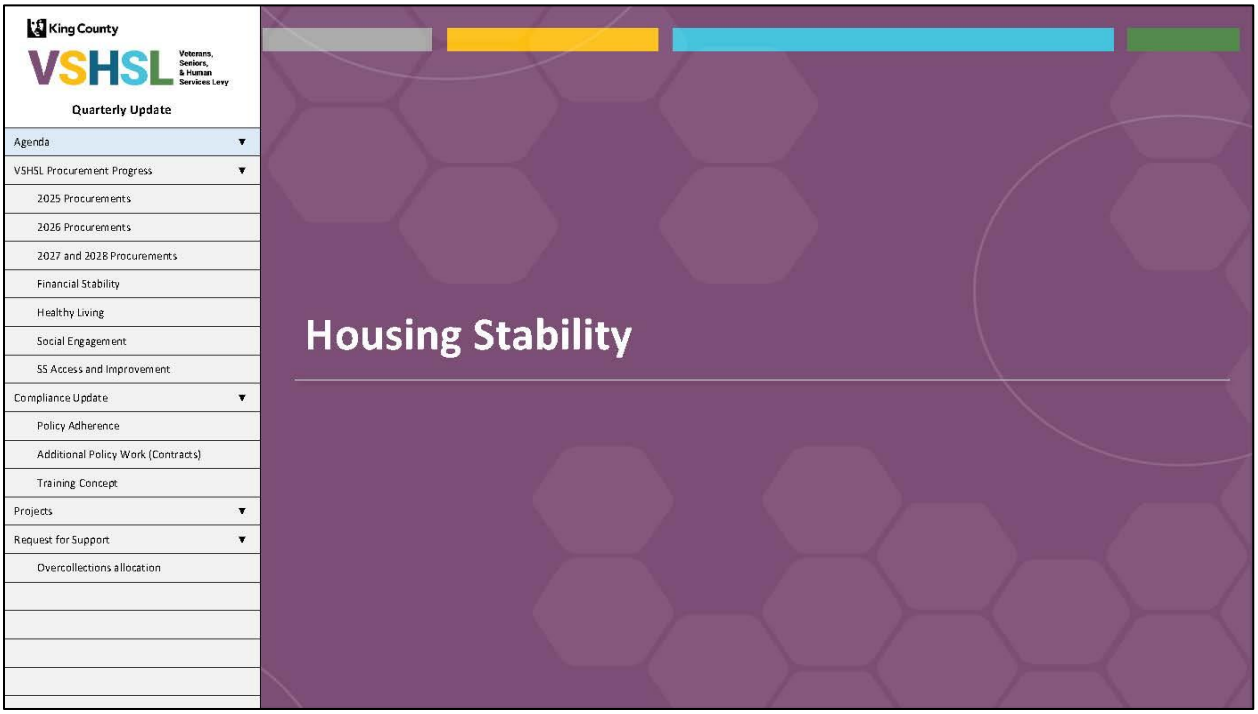
Overview of VSHSL 2027 Procurements
FS 3 – Benefit Application & Appeals Assistance
FS 5 – Supporting Student Veterans and Their Families
HL 2 – Mental Health Counseling
HS 5 – Senior Villages
SE 2C – Resilient Communities Reentry Spanning Services
SE 7 – Vets Engaged
SE 9 – Short-Term Engagement Projects
SE 10 – Support Services for Immigrants & Refugees
SS 7 – Countywide Nonprofit Workforce Surveys
Overview of VSHSL 2028 Procurements
HL 6 – Senior Health Promotion
HL 10 – Countywide Gender-Based Violence & Trafficking Prevention
HL 14 – Home-Based Services (PHSKC)
HL 15 – Community-Based Parenting Supports (PHSKC)
HS 7 – Housing Counseling & Foreclosure Prevention
HS 8 – Housing Legal Aid
SE 3 – Community Supports for Persons with Disabilities
SE 7 – Vets Engaged
SE 9 – Short-Term Engagement Projects



Strategy	Not Active	In-Development	Active
FS 1 - King County Veterans Program (KCVP)			●
FS 2 - Employment, Training, Placement, and Supports			●
FS 3 - Benefit Application and Appeals Assistance			●
FS 4 - King County Veterans Fellowship			●
FS 5 - Support for Student Veterans and their Families			●
FS 6 - Human Services Workforce Stabilization			●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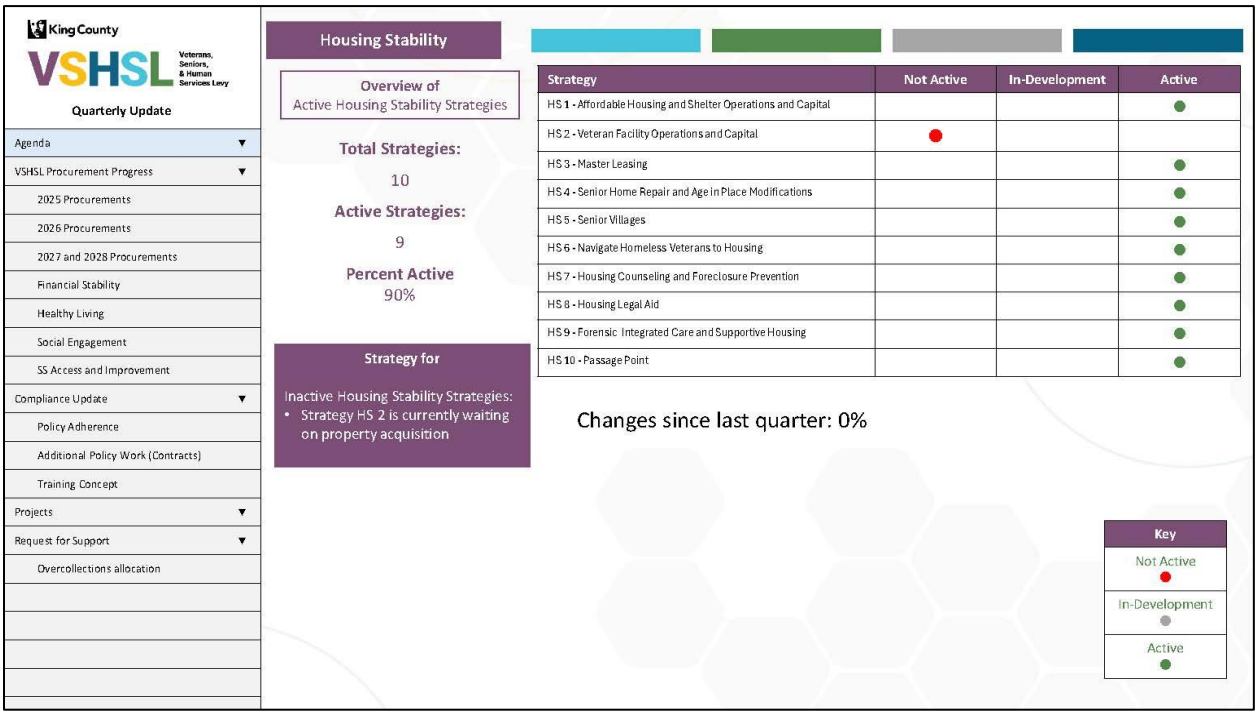
Housing Stability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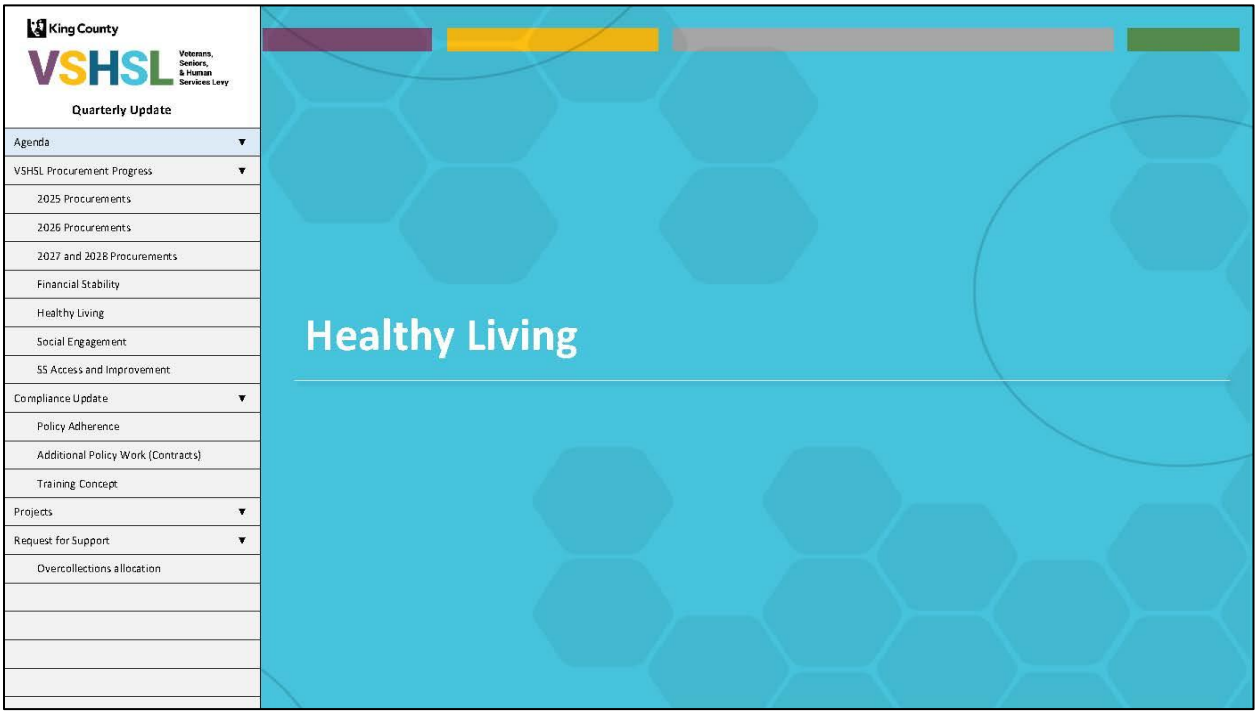
Housing Stability
Overview of Active Housing Stability Strategies
Total Strategies:
10
Active Strategies:
9
Percent Active
90%
Strategy for
Inactive Housing Stability Strategies:
• Strategy HS 2 is currently waiting on property acquisition
Strategy
Not Active
In-Development
Active
HS 1 - Affordable Housing and Shelter Operations and Capital
HS 2 - Veteran Facility Operations and Capital
HS 3 - Master Leasing
HS 4 - Senior Home Repair and Age in Place Modifications
HS 5 - Senior Villages
HS 6 - Navigate Homeless Veterans to Housing
HS 7 - Housing Counseling and Foreclosure Prevention
HS 8 - Housing Legal Aid
HS 9 - Forensic Integrated Care and Supportive Housing
HS 10 - Passage Point
Changes since last quarter: 0%
Key
Not Active
In-Development
Active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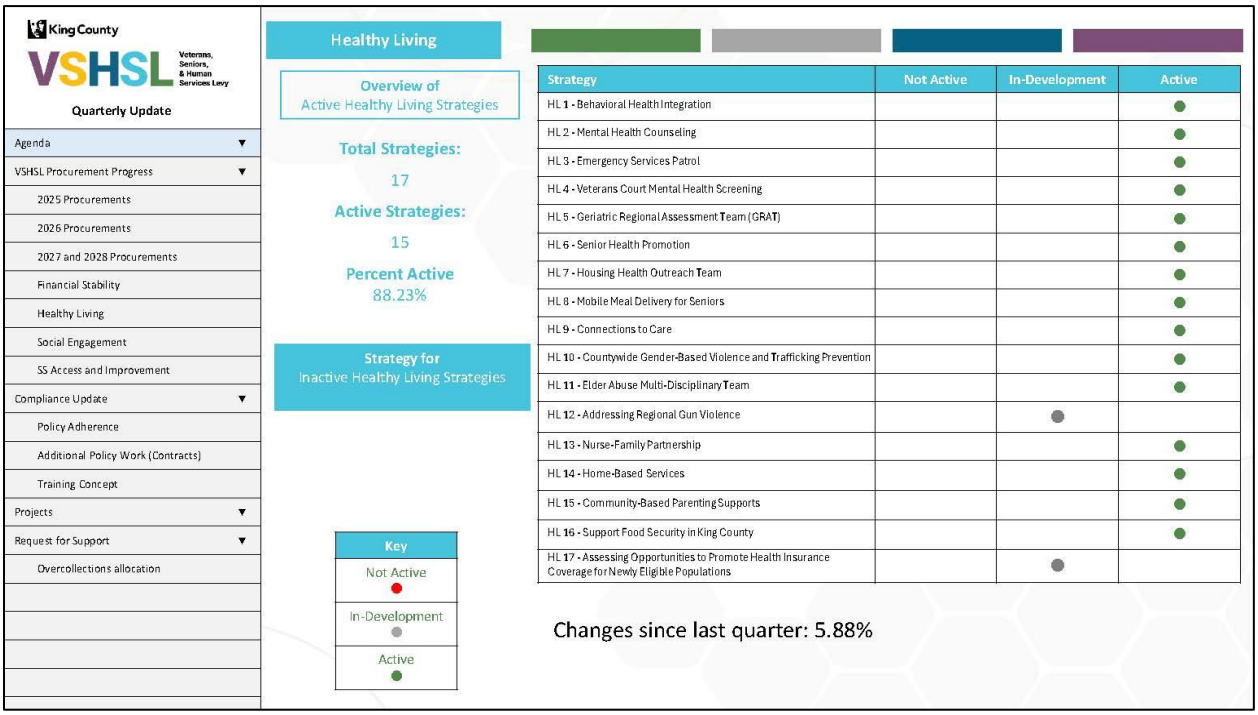
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Healthy Living
Overview of Active Healthy Living Strategies
Total Strategies:
17
Active Strategies:
15
Percent Active
88.23%
Strategy for Inactive Healthy Living Strategies
Key
Not Active
In-Development
Active
Strategy | Not Active | In-Development | Active
HL 1 - Behavioral Health Integration
HL 2 - Mental Health Counseling
HL 3 - Emergency Services Patrol
HL 4 - Veterans Court Mental Health Screening
HL 5 - Geriatric Regional Assessment Team (GRAT)
HL 6 - Senior Health Promotion
HL 7 - Housing Health Outreach Team
HL 8 - Mobile Meal Delivery for Seniors
HL 9 - Connections to Care
HL 10 - Countywide Gender-Based Violence and Trafficking Prevention
HL 11 - Elder Abuse Multi-Disciplinary Team
HL 12 - Addressing Regional Gun Violence
HL 13 - Nurse-Family Partnership
HL 14 - Home-Based Services
HL 15 - Community-Based Parenting Supports
HL 16 - Support Food Security in King County
HL 17 - Assessing Opportunities to Promote Health Insurance Coverage for Newly Eligible Populations
Changes since last quarter: 5.88%

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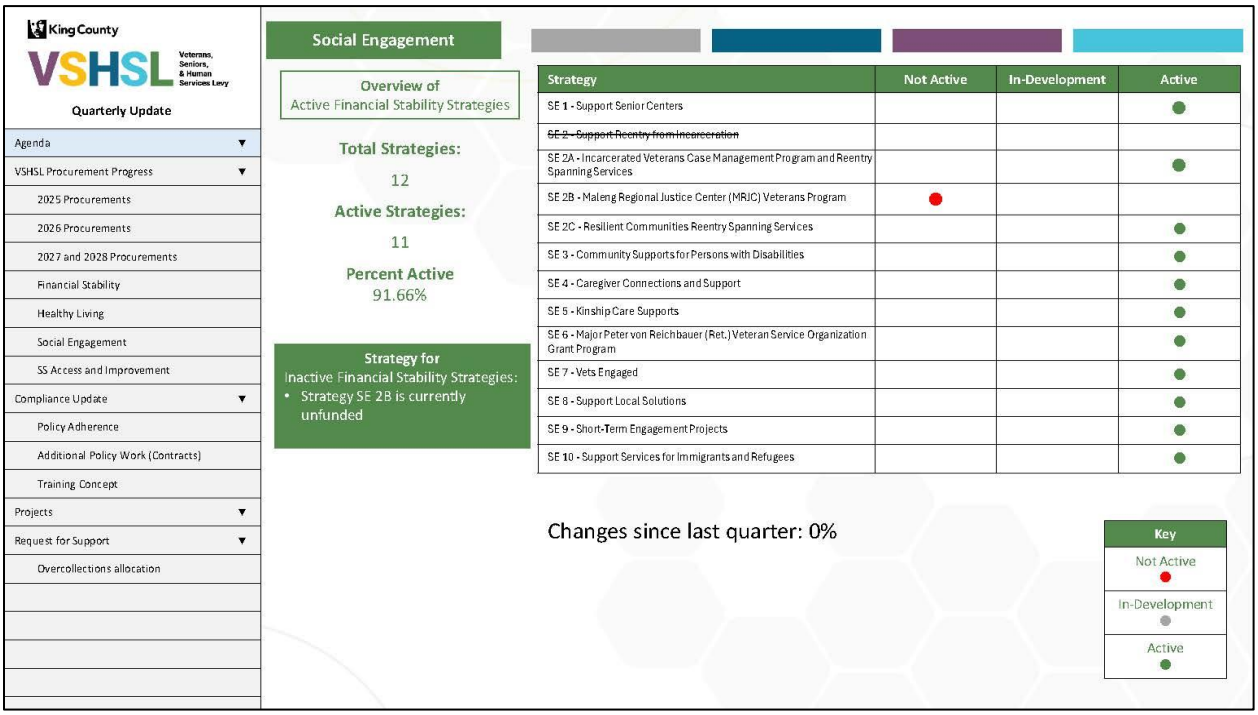
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Overview of Active Financial Stability Strategies
Total Strategies:
12
Active Strategies:
11
Percent Active
91.66%
Strategy for Inactive Financial Stability Strategies:
• Strategy SE 2B is currently unfunded
Strategy | Not Active | In-Development | Active
SE 1 - Support Senior Centers | | | ●
~~SE 2 - Support Reentry from Incarceration~~ | | |
SE 2A - Incarcerated Veterans Case Management Program and Reentry Spanning Services | | | ●
SE 2B - Maleng Regional Justice Center (MRJC) Veterans Program | ● | |
SE 2C - Resilient Communities Reentry Spanning Services | | | ●
SE 3 - Community Supports for Persons with Disabilities | | | ●
SE 4 - Caregiver Connections and Support | | | ●
SE 5 - Kinship Care Supports | | | ●
SE 6 - Major Peter von Reichbauer (Ret.) Veteran Service Organization Grant Program | | | ●
SE 7 - Vets Engaged | | | ●
SE 8 - Support Local Solutions | | | ●
SE 9 - Short-Term Engagement Projects | | | ●
SE 10 - Support Services for Immigrants and Refugees | | | ●
Changes since last quarter: 0%
Key
Not Active
In-Development
Active

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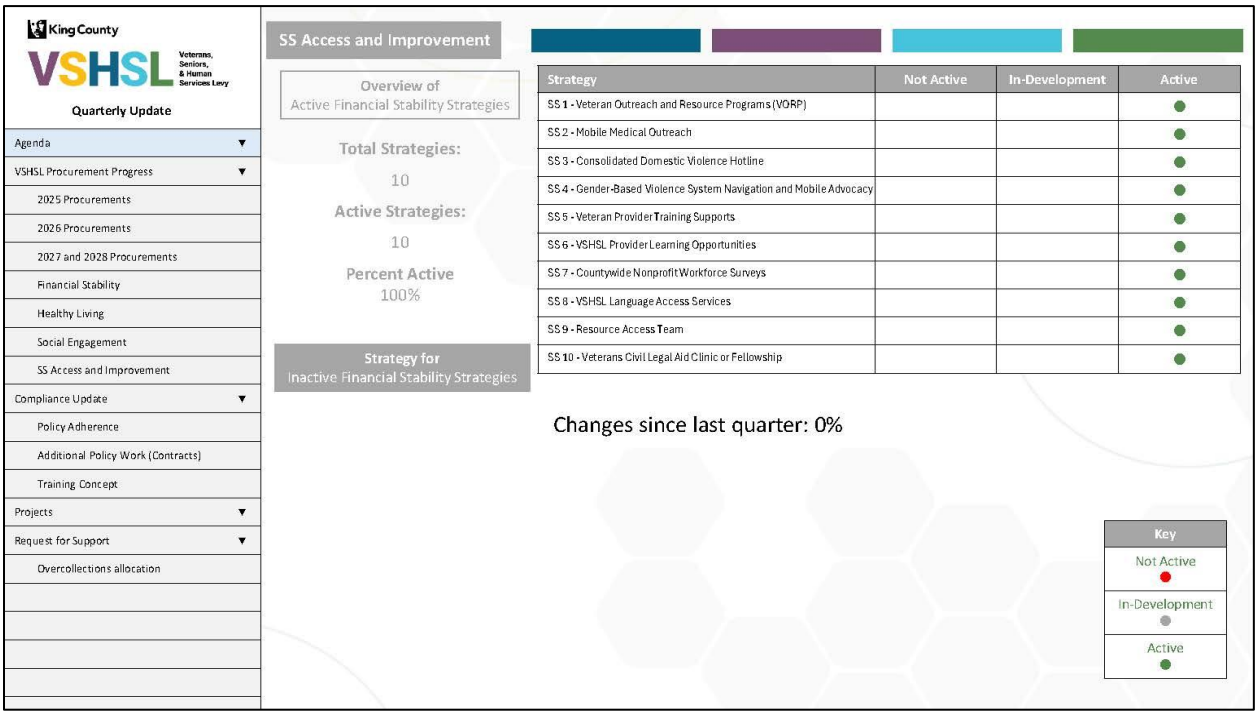
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Overview of Active Financial Stability Strategies
Total Strategies:
10
Active Strategies:
10
Percent Active
100%
Strategy for Inactive Financial Stability Strategies
Strategy
Not Active
In-Development
Active
SS 1 - Veteran Outreach and Resource Programs (VORP)
SS 2 - Mobile Medical Outreach
SS 3 - Consolidated Domestic Violence Hotline
SS 4 - Gender-Based Violence System Navigation and Mobile Advocacy
SS 5 - Veteran Provider Training Supports
SS 6 - VSHSL Provider Learning Opportunities
SS 7 - Countywide Nonprofit Workforce Surveys
SS 8 - VSHSL Language Access Services
SS 9 - Resource Access Team
SS 10 - Veterans Civil Legal Aid Clinic or Fellowship
Changes since last quarter: 0%
Key
Not Active
In-Development
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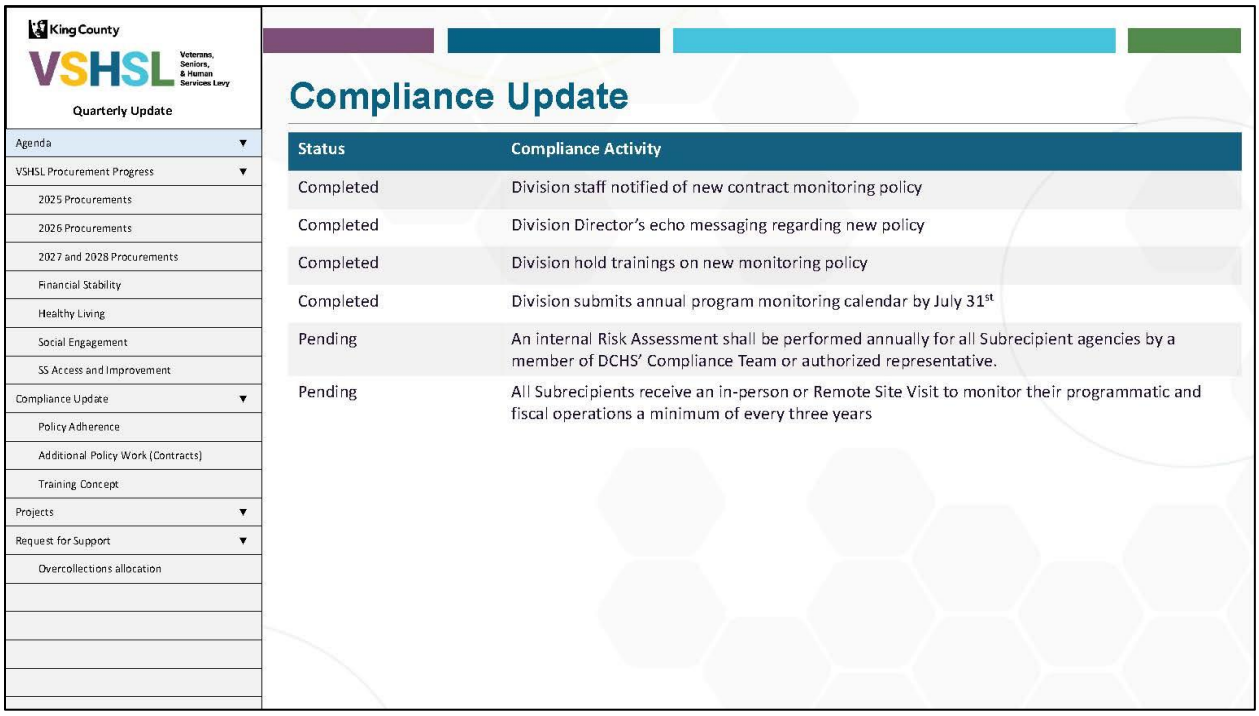
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Status
Compliance Activity
Completed
Division staff notified of new contract monitoring policy
Completed
Division Director's echo messaging regarding new policy
Completed
Division hold trainings on new monitoring policy
Completed
Division submits annual program monitoring calendar by July 31st
Pending
An internal Risk Assessment shall be performed annually for all Subrecipient agencies by a member of DCHS' Compliance Team or authorized representative.
Pending
All Subrecipients receive an in-person or Remote Site Visit to monitor their programmatic and fiscal operations a minimum of every three years

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Compliance Update

Status	Additional Activity
Completed	Development of pre-vendor assessment, risk calculator, and recommended risk mitigation strategies
Completed	Development of pre-vendor intake survey
In-Progress	Piloting of pre-vendor intake survey and pre-vendor assessment
Pending	Stagging of contract administration policies
Pending	Scheduled meeting with C&P to share desired contract administration chapters and policies
Pending	Stagging of contract administration training modules in articulate
Complete	Stagging of fraud detection and prevention training (proof of concept) in articulate

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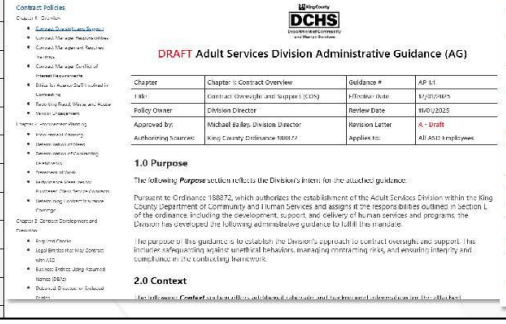
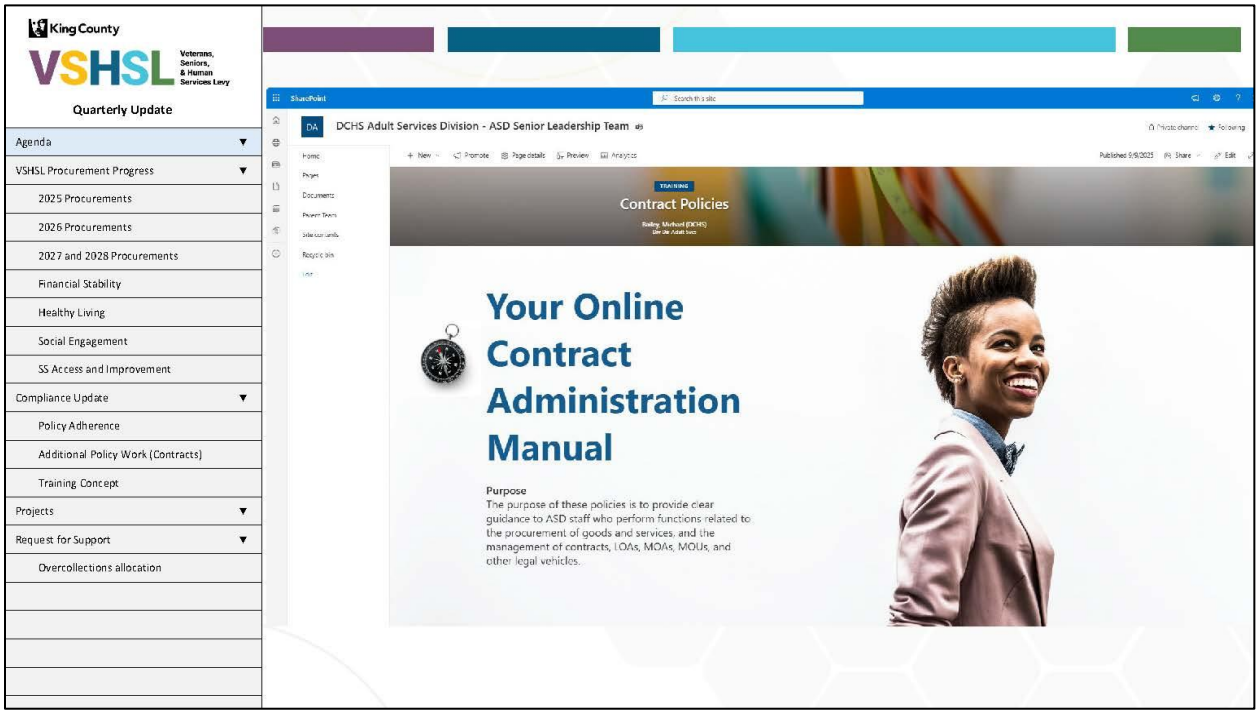
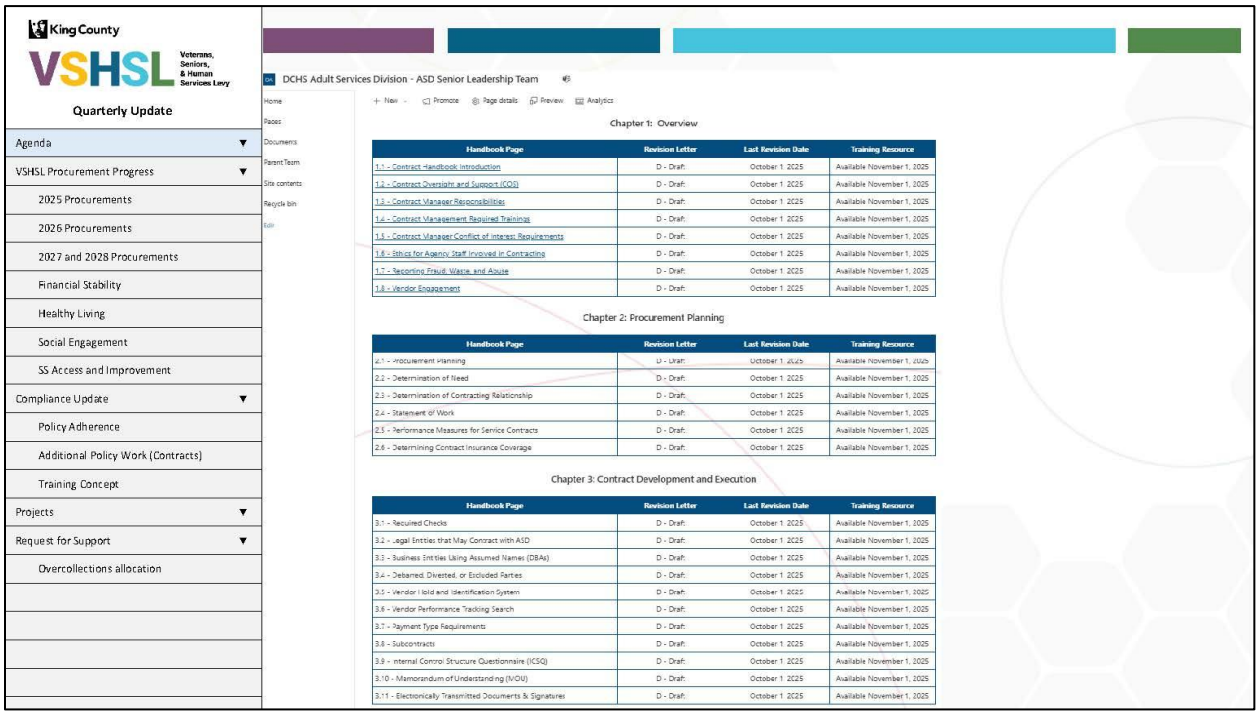
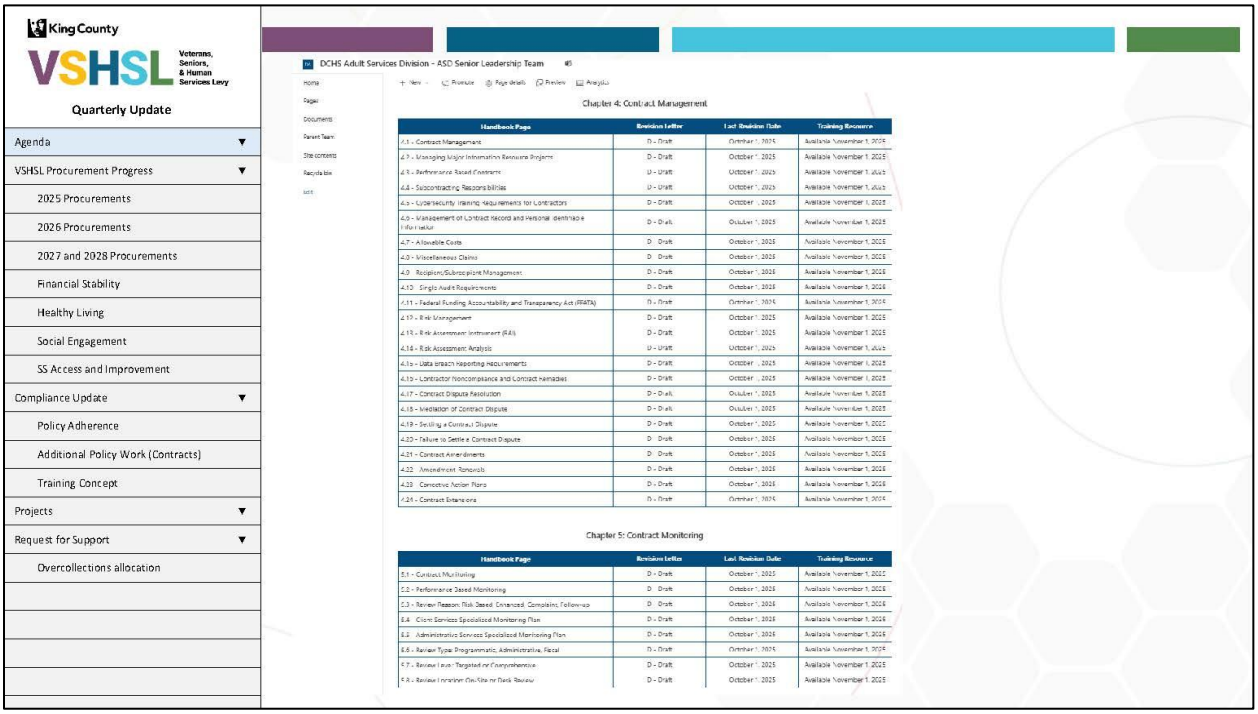






Report one of two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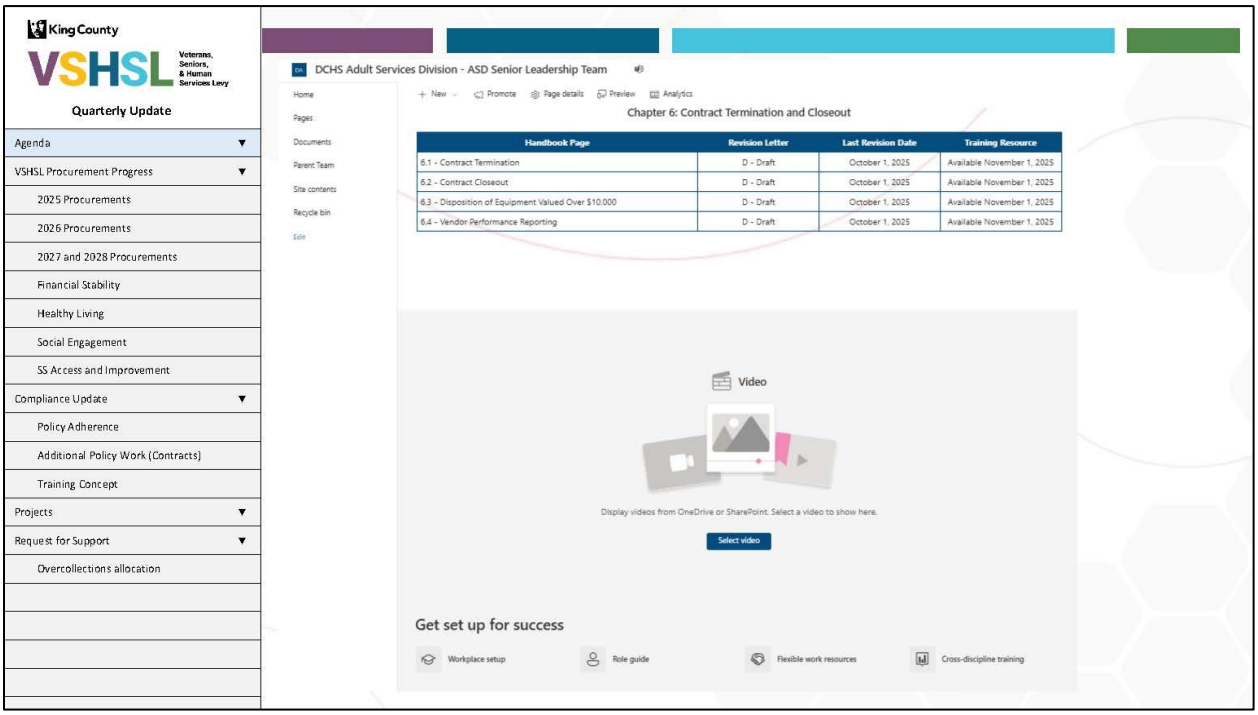
DCHS Adult Services Division - ASD Senior Leadership Team
Chapter 4: Contract Management
Chapter 5: Contract Monitoring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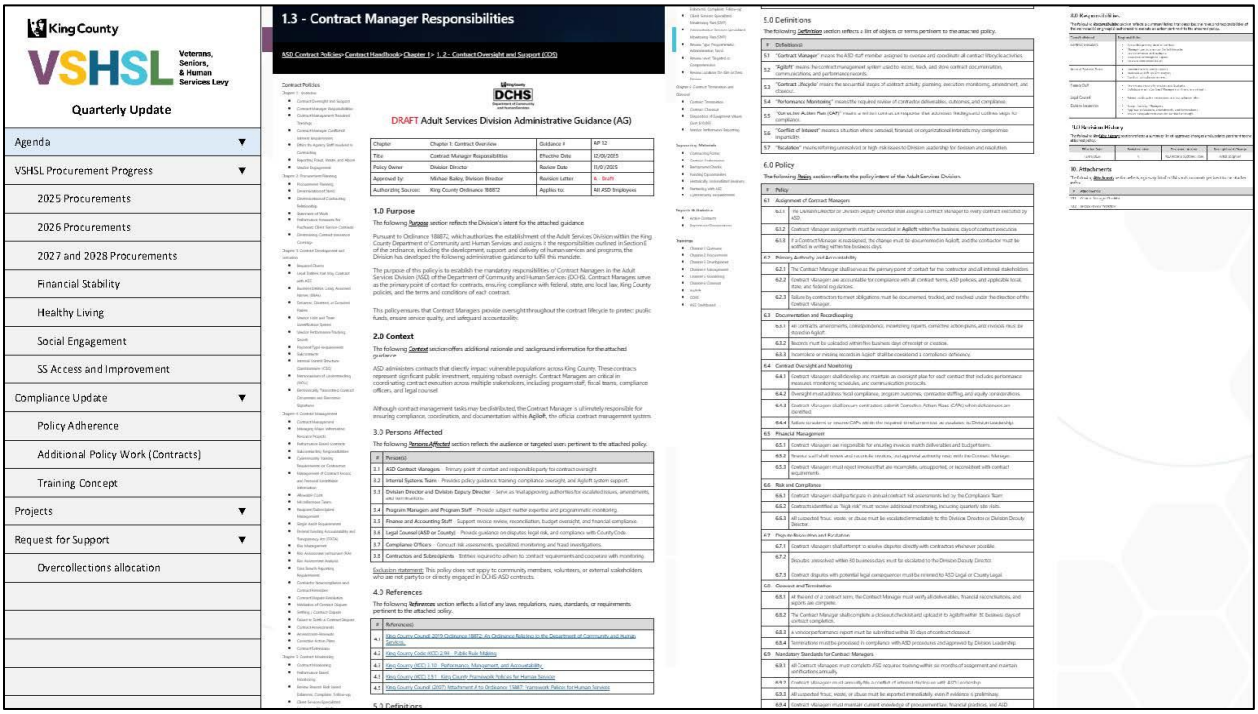
DCHS Adult Services Division - ASD Senior Leadership Team
Chapter 6: Contract Termination and Closeout
Handbook Page
Revision Letter
Last Revision Date
Training Resource
6.1 - Contract Termination
D - Draft
October 1, 2025
Available November 1, 2025
6.2 - Contract Closeout
D - Draft
October 1, 2025
Available November 1, 2025
6.3 - Disposition of Equipment Valued Over $10,000
D - Draft
October 1, 2025
Available November 1, 2025
6.4 - Vendor Performance Reporting
D - Draft
October 1, 2025
Available November 1, 2025
Video
Display videos from OneDrive or SharePoint. Select a video to show here.
Select video
Get set up for success
Workplace setup
Role guide
Flexible work resources
Cross-discipline training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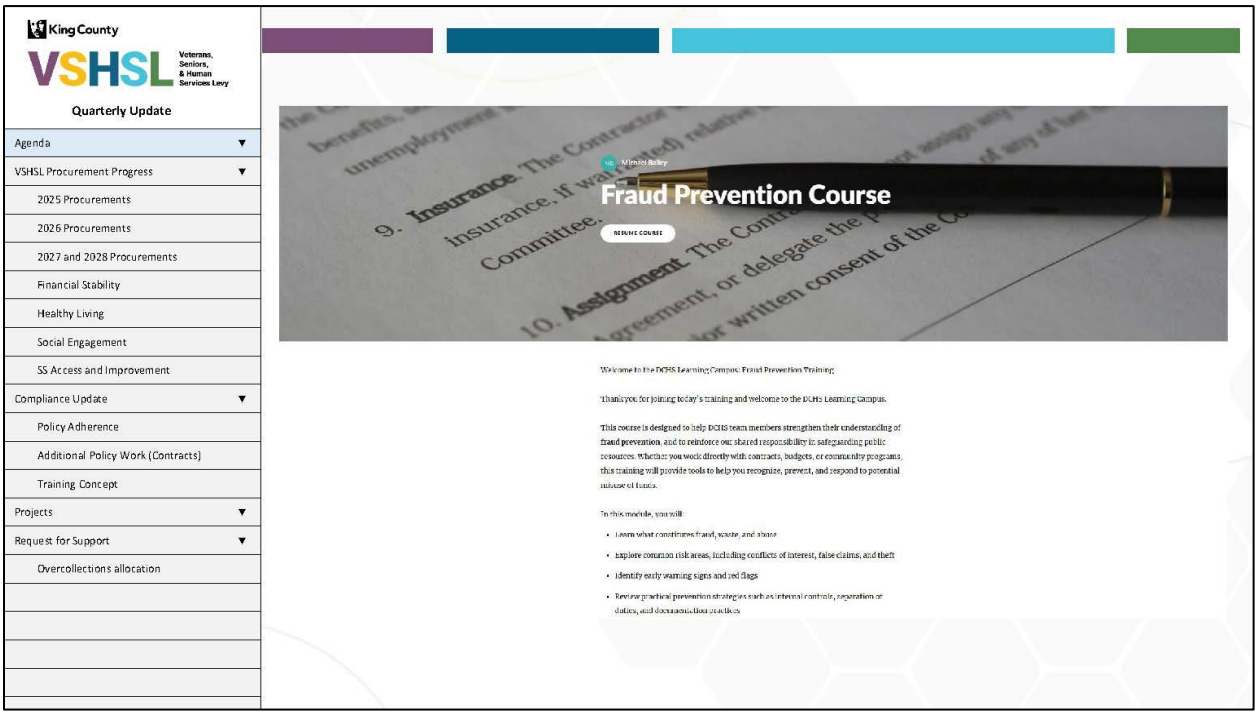
1.3 - Contract Manager Responsibilities
DRAFT Adult Services Division Administrative Guidance (AG)
1.0 Purpose
2.0 Context
3.0 Persons Affected
4.3 References
5.0 Definitions
6.0 Policy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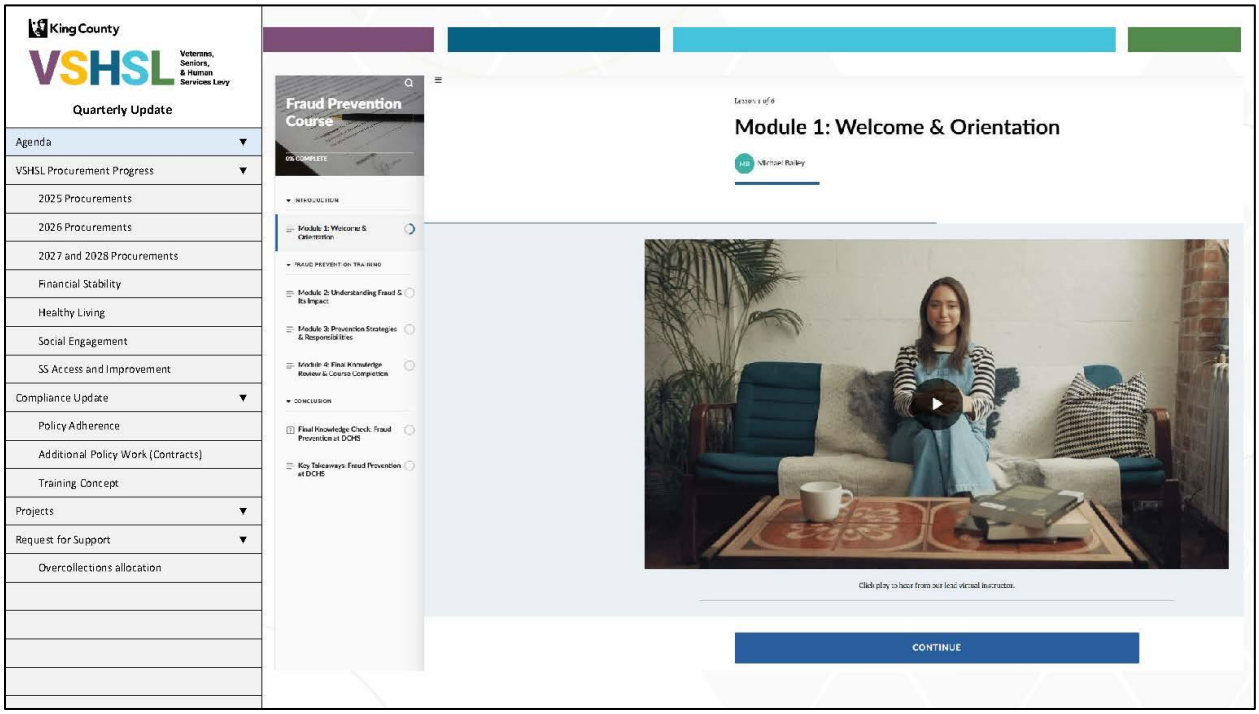
Fraud Prevention Course
RESUME COURSE
Welcome to the DCHS Learning Campus: Fraud Prevention Training
Thank you for joining today's training and welcome to the DCHS Learning Campus.
This course is designed to help DCHS team members strengthen their understanding of fraud prevention, and to reinforce our shared responsibility in safeguarding public resources. Whether you work directly with contracts, budgets, or community programs, this training will provide tools to help you recognize, prevent, and respond to potential misuse of funds.
In this module, you will:
Learn what constitutes fraud, waste, and abuse
Explore common risk areas, including conflicts of interest, false claims, and theft
Identify early warning signs and red flags
Review practical prevention strategies such as internal controls, separation of duties, and documentation practices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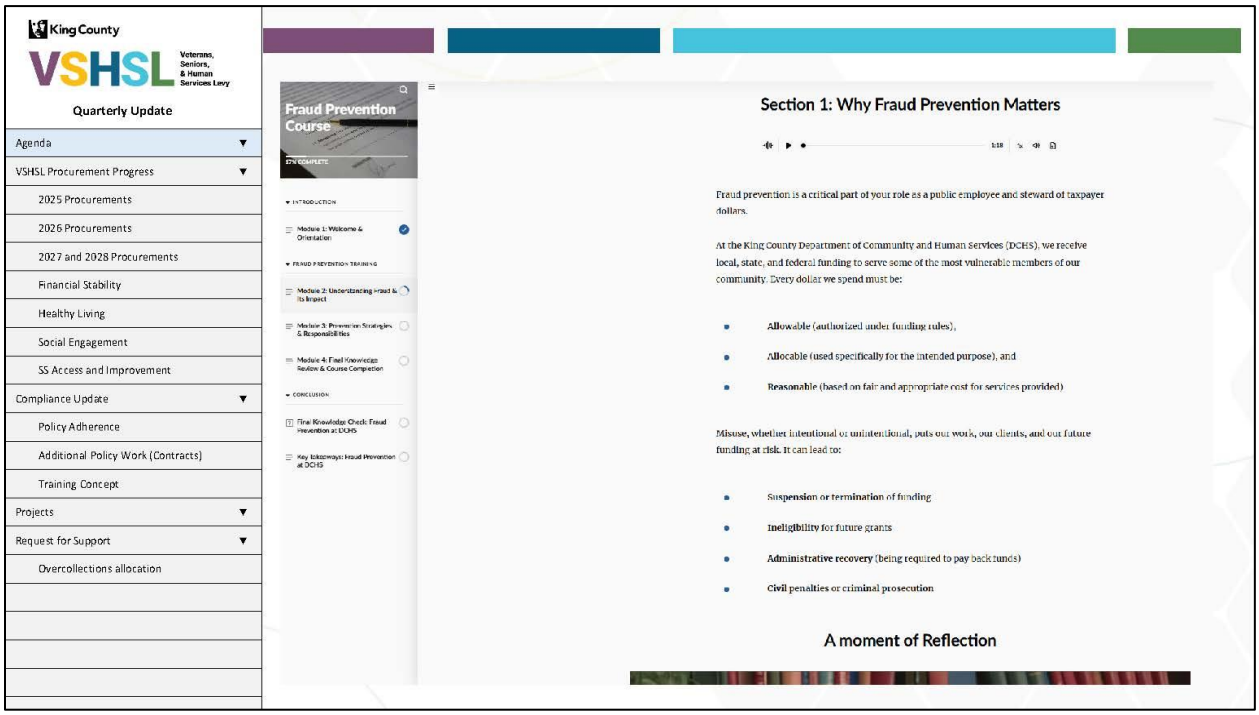
Fraud Prevention Course
Module 1: Welcome & Orientation
CONTINUE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Section 1: Why Fraud Prevention Matters
Fraud prevention is a critical part of your role as a public employee and steward of taxpayer dollars.
At the King County Department of Community and Human Services (DCHS), we receive local, state, and federal funding to serve some of the most vulnerable members of our community. Every dollar we spend must be:
Allowable (authorized under funding rules),
Allocable (used specifically for the intended purpose), and
Reasonable (based on fair and appropriate cost for services provided)
Misuse, whether intentional or unintentional, puts our work, our clients, and our future funding at risk. It can lead to:
Suspension or termination of funding
Ineligibility for future grants
Administrative recovery (being required to pay back funds)
Civil penalties or criminal prosecution
A moment of Reflection

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Annual Report Preview

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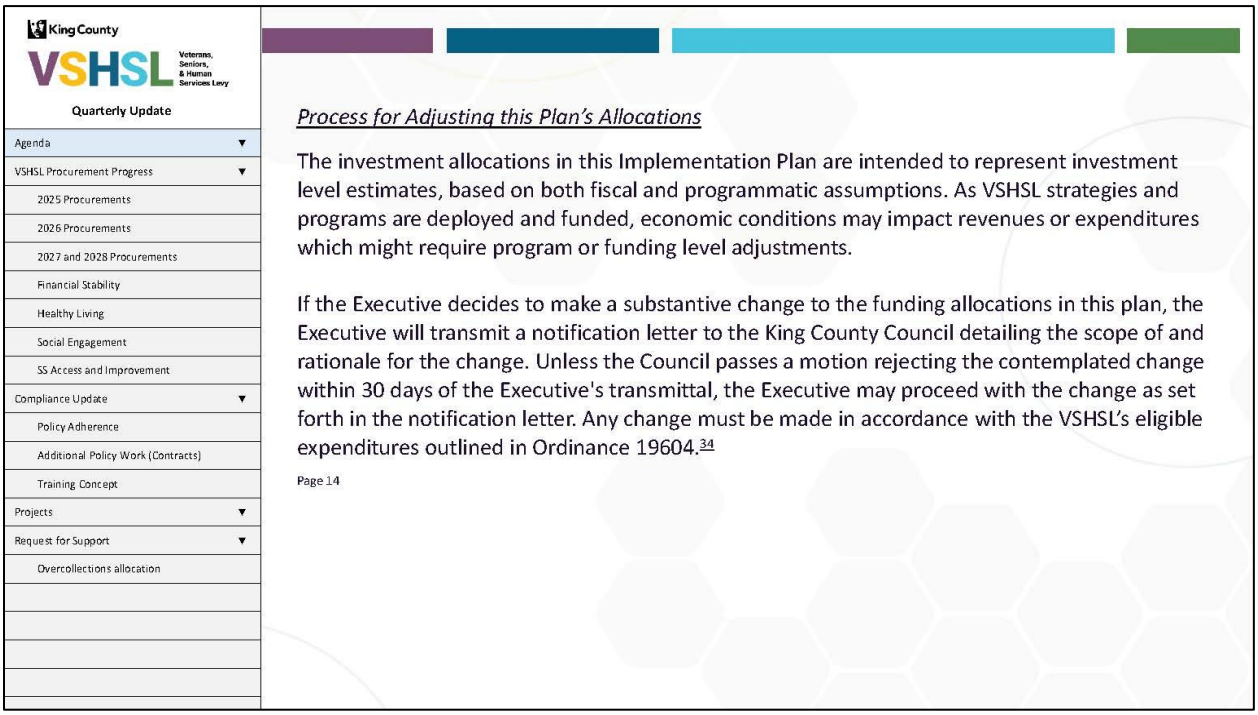
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Process for Adjusting this Plan's Allocations
The investment allocations in this Implementation Plan are intended to represent investment level estimates, based on both fiscal and programmatic assumptions. As VSHSL strategies and programs are deployed and funded, economic conditions may impact revenues or expenditures which might require program or funding level adjustments.
If the Executive decides to make a substantive change to the funding allocations in this plan, the Executive will transmit a notification letter to the King County Council detailing the scope of and rationale for the change. Unless the Council passes a motion rejecting the contemplated change within 30 days of the Executive's transmittal, the Executive may proceed with the change as set forth in the notification letter. Any change must be made in accordance with the VSHSL's eligible expenditures outlined in Ordinance 19604.34
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Board Recruitment Packet

The Veterans, Seniors, and Human Services Levy Advisory Board

The Veterans, Seniors, and Human Services Levy Advisory Board operates within the King County Department of Community and Human Services (DCHS) and provides community-informed guidance on the implementation of the Veterans, Seniors, and Human Services Levy (VSHSL).

The Advisory Board centers the voices, lived experience, and expertise of community members and serves in an advisory capacity to support equitable, transparent, and accountable use of voter-approved Levy funds. Through population-focused subcommittees, the Board provides insight on investments that promote housing stability, healthy living, financial stability, social engagement, and service system access and improvement for veterans, aging adults and caregivers, and resilient communities across King County.

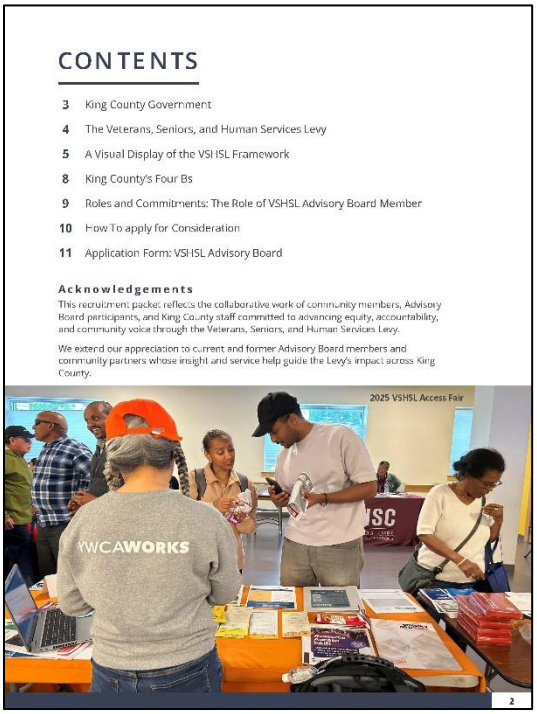
Serving on the Advisory Board is an opportunity to contribute to public decision-making, elevate community priorities, and help shape a service system that supports residents to live with dignity, stability, and connection.

VSHSL Webpage: kingcounty.gov/vshsl

King County Department of Community and Health Services
Adult Services Division
CNK-HS-0500
401 Fifth Avenue, Suite 500
Seattle, WA 98104

www.kingcounty.gov/vshsl
@KingCountyDchs
@KingCountyVetsProgram

King County DCHS Department of Community and Human Services
King County VSHSL Veterans, Seniors, & Human Services Levy



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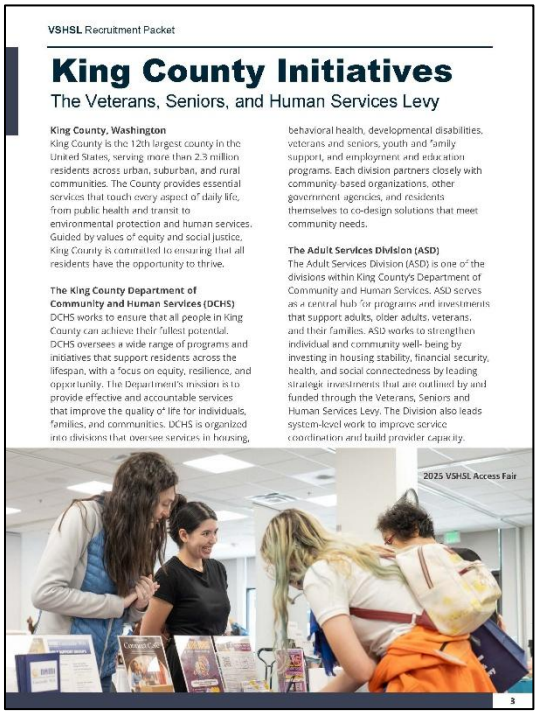
8 King County's Four Bs
9 Roles and Commitments: The Role of VSHSL Advisory Board Member
10 How To apply for Consideration
11 Application Form: VSHSL Advisory Board

Acknowledgements

This recruitment packet reflects the collaborative work of community members, Advisory Board participants, and King County staff committed to advancing equity, accountability, and community voice through the Veterans, Seniors, and Human Services Levy.

We extend our appreciation to current and former Advisory Board members and community partners whose insight and service help guide the Levy's impact across King County.

2025 VSHSL Access Fair



King County Initiatives

The Veterans, Seniors, and Human Services Levy

King County, Washington
King County is the 12th largest county in the United States, serving more than 2.3 million residents across urban, suburban, and rural communities. The County provides essential services that touch every aspect of daily life, from public health and transit to environmental protection and human services. Guided by values of equity and social justice, King County is committed to ensuring that all residents have the opportunity to thrive.

The King County Department of Community and Human Services (DCHS)
DCHS works to ensure that all people in King County can achieve their fullest potential. DCHS oversees a wide range of programs and initiatives that support residents across the lifespan, with a focus on equity, resilience, and opportunity. The Department's mission is to provide effective and accountable services that improve the quality of life for individuals, families, and communities. DCHS is organized into divisions that oversee services in housing, behavioral health, developmental disabilities, veterans and seniors, youth and family support, and employment and education programs. Each division partners closely with community-based organizations, other government agencies, and residents themselves to co-design solutions that meet community needs.

The Adult Services Division (ASD)
The Adult Services Division (ASD) is one of the divisions within King County's Department of Community and Human Services. ASD serves as a central hub for programs and investments that support adults, older adults, veterans, and their families. ASD works to strengthen individual and community well-being by investing in housing stability, financial security, health, and social connectedness by leading strategic investments that are outlined by and funded through the Veterans, Seniors and Human Services Levy. The Division also leads system-level work to improve service coordination and build provider capacity.

2025 VSHSL Access Fair

Understanding The Veterans, Seniors, and Human Services Levy (VSHSL)
The Veterans, Seniors, and Human Services Levy (VSHSL) is a voter-approved, locally funded initiative that supports services for veterans, seniors, caregivers, and communities that face barriers to accessing essential supports across King County.

First approved by voters in 2011 and renewed by voters in subsequent cycles, the Levy reflects a shared public commitment to investing in housing stability, health, financial security, social connection, and access to services. Levy funds are distributed through a combination of community-based organizations and County-operated programs.

Because the Levy is locally funded, it provides King County with flexibility to respond to community-identified needs while maintaining accountability to voters through public reporting, advisory oversight, and transparent decision-making.

What the Levy Supports
Levy investments are organized around five result areas that reflect community priorities and voter intent:

- ❑ Housing Stability – supporting individuals and families to obtain and maintain safe, stable housing
- ❑ Healthy Living – promoting physical, behavioral, and mental health
- ❑ Financial Stability – helping residents meet basic needs and improve economic security
- ❑ Social Engagement – reducing isolation and strengthening community connection
- ❑ Service System Access and Improvement – improving how people access services and navigate systems

Together, these result areas form a coordinated approach to improving well-being and reducing disparities across King County.

Priority Populations Served by the Levy
The Levy prioritizes three population groups identified in authorizing legislation:

Veterans, military servicemembers, and their families.
- This priority population includes individuals who have served or are currently serving in the United States Armed Forces, including active duty, National Guard, and reserve members, as well as members of their families.

Seniors and their caregivers.
- This priority population includes individuals 55 years of age or older, as well as caregivers who provide support to seniors. Caregivers may be family members or others with an ongoing personal relationship to the senior, regardless of whether caregiving is their primary role.

Resilient communities.
- Resilient communities include individuals and groups who are more likely to experience reduced health, housing, financial, or social stability due to systemic or historical barriers. These barriers may include exposure to trauma, violence, poverty, isolation, discrimination, racism, stigma, disability, or chronic illness.

These priority populations guide how investments are planned and implemented.

The VSHSL Framework

One System, 3 Priority Populations, 5 Result Areas, 55 Strategies

Blazing a Path Forward
In its twentieth year, the Veterans, Seniors, and Human Services Levy (VSHSL) continues to invest in the strength and wellbeing of King County's people and communities. Through partnerships with nonprofit organizations, community-based coalitions, and local governments, the VSHSL helps individuals and families access the support they need to live with dignity, connection, and purpose.

VSHSL Result Areas
To create meaningful and measurable change, the VSHSL organizes its work around five interconnected result areas that reflect the essential building blocks of a thriving community. Each of those five result areas can be found in the space below. Be sure to look on pages 6 and 7 for more.

Service System Access and Improvement: Strengthening the capacity, coordination, and accessibility of human service systems.

Financial Stability: Expanding opportunities for economic security and financial resilience.

Healthy Living: Promoting physical, mental, and behavioral health and overall well-being.

Housing Stability: Ensuring individuals and families have access to safe, stable, and affordable housing.

Social Engagement: Building connection, belonging, and community participation.

VSHSL Priority Populations
In addition to its Result Areas, the VSHSL also centers its investments around three priority populations in addition to the human service worker population. Each of those populations can be found in the space below.

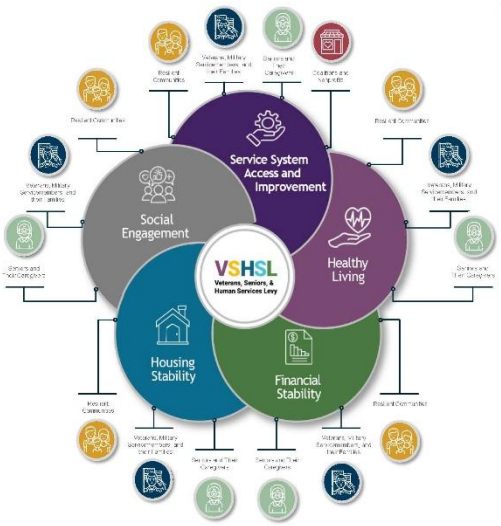
Resilient Communities: Partnering with communities that have been historically and systemically marginalized to strengthen their collective resilience and access to opportunity.

Seniors and Caregivers: Promoting independence, caregiving support, and age-friendly communities.

Veterans, Military Service Members, and Their Families: Honoring and supporting those who have served through targeted investments in stability and well-being.

Nonprofits and Coalitions: Strengthening the human services sector by supporting nonprofit organizations, coalitions, and networks

A Visual Display of Our Five Result Areas and The Priority Populations They Serve



Our VSHSL Strategies

How Each Strategy Works Together

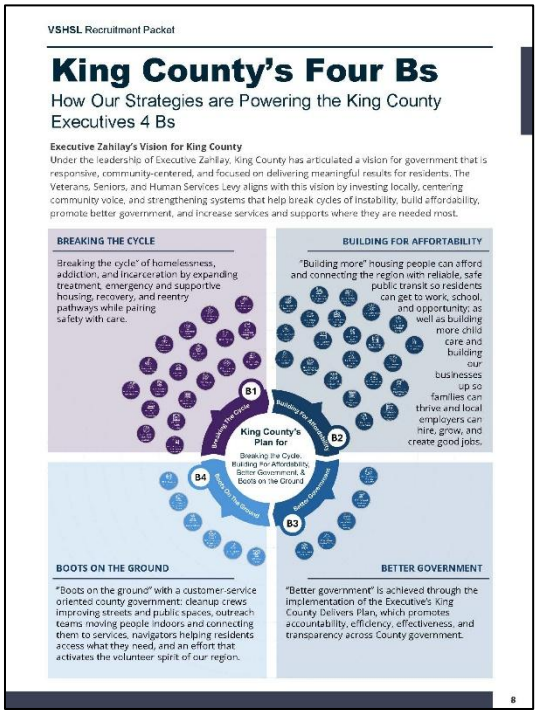
The 2024 - 2029 VSHSL Implementation Plan advances **service system access and improvement** by funding 10 strategies. These strategies seek to increase the accessibility of services and support; fund trainings, translation services, and interpretation services.

The 2024 - 2029 VSHSL Implementation Plan advances **healthy living** by funding 17 strategies. These strategies support; seek to depression intervention and counseling to prevent issues associated with neglected mental health; support senior wellness programming to promote healthy and active aging; and improve individual and community health.

The 2024 - 2029 VSHSL Implementation Plan advances **social engagement** by funding 12 strategies. These strategies seek to reduce senior and veteran isolation and the associated risks; reducing recidivism; providing supports for persons with disabilities; and addressing the unique needs of immigrants and refugees.

The 2024 - 2029 VSHSL Implementation Plan advances **financial stability** by funding six strategies. These strategies seek to support the innovation, expansion, and enhancement of the King County Veterans Program; create pathways to financial independence; help residents leverage benefits; and stabilize the human services workforce.

The 2024 - 2029 VSHSL Implementation Plan advances **housing stability** by funding 10 strategies. These strategies seek to create affordable housing for individuals, families, and other households; support older adults with aging in place, prevent foreclosure and eviction; and provide pathways out of homelessness for veterans.



VSHSL Recruitment Packet

King County's Four Bs

How Our Strategies are Powering the King County Executives 4 Bs

Executive Zahilay's Vision for King County

Under the leadership of Executive Zahilay, King County has articulated a vision for government that is responsive, community-centered, and focused on delivering meaningful results for residents. The Veterans, Seniors, and Human Services Levy aligns with this vision by investing locally, centering community voice, and strengthening systems that help break cycles of instability, build affordability, promote better government, and increase services and supports where they are needed most.

BREAKING THE CYCLE

Breaking the cycle" of homelessness, addiction, and incarceration by expanding treatment, emergency and supportive housing, recovery, and reentry pathways while pairing safety with care.

BUILDING FOR AFFORDABILITY

"Building more" housing people can afford and connecting the region with reliable, safe public transit so residents can get to work, school, and opportunity; as well as building more child care and building our businesses up so families can thrive and local employers can hire, grow, and create good jobs.

BOOTS ON THE GROUND

"Boots on the ground" with a customer-service oriented county government: cleanup crews improving streets and public spaces, outreach teams moving people indoors and connecting them to services, navigators helping residents access what they need, and an effort that activates the volunteer spirit of our region.

BETTER GOVERNMENT

"Better government" is achieved through the implementation of the Executive's King County Delivers Plan, which promotes accountability, efficiency, effectiveness, and transparency across County government.

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VSHSL Recruitment Packet

Roles and Commitments

The Role of a VSHSL Advisory Board Member

Serving as An Advisory Board Member

Serving on the Veterans, Seniors, and Human Services Levy Advisory Board is a public service role centered on community voice, lived experience, and stewardship of a voter-approved public investment. Board members serve in an advisory capacity, helping inform how Levy funds are implemented to advance equitable outcomes across King County.

What Board Members Do

As a member of the Advisory Board, you will:

- ❑ Bring lived experience, community perspective, or subject-matter expertise to community discussions
- ❑ Review information, data, and materials prepared by County staff
- ❑ Participate in public meetings and population-focused subcommittees
- ❑ Ask questions, share insights, and contribute to advisory recommendations
- ❑ Help ensure investments remain aligned with voter intent and community need

Advisory, Not Operational

The Advisory Board's role is advisory only. Board members do not:

- ❑ Select service providers
- ❑ Approve contracts or budgets
- ❑ Direct County staff
- ❑ Represent the County in an official

This distinction helps maintain clear roles and supports transparency and public trust.

Serving Through Subcommittees

Each Board member serves on one of three standing subcommittees aligned with a Levy priority population:

- ❑ Veterans, military servicemembers, and their families
- ❑ Aging adults and caregivers
- ❑ Resilient communities

Subcommittees allow members to engage more deeply with issues affecting specific populations and bring focused insights back to the full Board.

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VSHSL Recruitment Packet

Preparing to Serve

How to Apply For Consideration

Applying to Be A Board Member

Serving on the Veterans, Seniors, and Human Services Levy Advisory Board is an opportunity to contribute your voice, experience, and perspective to a voter-approved public investment that supports communities across King County.

King County encourages applications from individuals with lived experience, professional expertise, and strong connections to the Levy's priority populations.

Eligibility

To be eligible for appointment, applicants must:

- ❑ Reside in King County
- ❑ Be able to serve in a public, advisory capacity
- ❑ Have lived experience, professional expertise, or demonstrated connection to one or more Levy priority populations:
  - Veterans, military servicemembers, and their families
  - Aging adults and caregivers
  - Resilient communities
- ❑ Be willing and able to participate in public meetings, review materials, and engage in advisory discussions

- ❑ Additional Eligibility Considerations
- ❑ Individuals employed by organizations that receive VSHSL funding may be eligible, but must:
  - Disclose potential conflicts of interest
  - Agree to recuse themselves from votes or discussions where a conflict may reasonably be perceived
- ❑ Appointment to a subcommittee constitutes full appointment to the Advisory Board, with all associated responsibilities and voting rights.

Appointment Process

Advisory Board members are appointed by the King County Executive from nominations submitted by designated nominating entities, which include:

- ❑ King County Councilmembers
- ❑ The City of Seattle
- ❑ The Sound Cities Association
- ❑ The Seattle-King County Advisory Council on Aging and Disability Services

Following nomination, applicants may be invited to participate in a brief interview. Final appointments are transmitted to and confirmed by the King County Council.

How to Express Interest

Individuals interested in serving are encouraged to:

- ❑ Respond to recruitment announcements issued by the King County Department of Community and Human Services, or
- ❑ Contact a designated nominating entity to express interest and learn more about current or upcoming vacancies

Recruitment materials typically include information about:

- ❑ Available subcommittee seats
- ❑ Desired lived experience or expertise
- ❑ Application steps and timelines

What to Expect After Applying

Applicants who move forward in the process will receive additional information about:

- ❑ Meeting schedules and time commitments
- ❑ Board responsibilities and bylaws
- ❑ Orientation and onboarding materials

Applicants not selected for immediate appointment may be considered for future vacancies.

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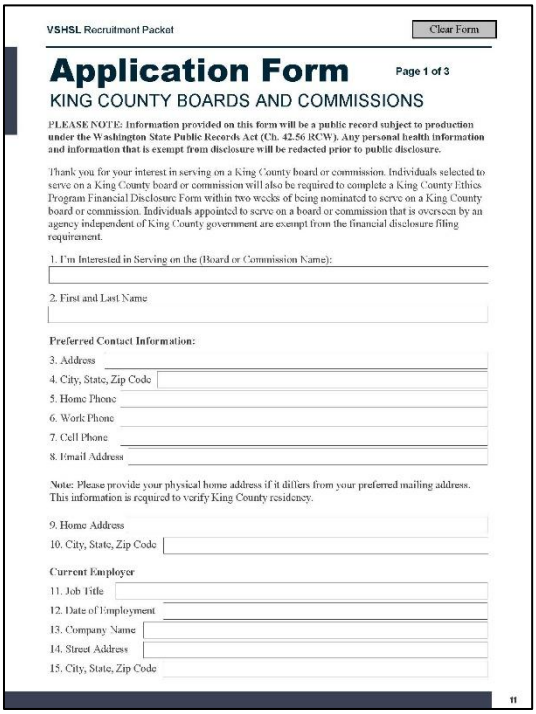

VSHSL Recruitment Packet

Clear Form

Application Form

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KING COUNTY BOARDS AND COMMISSIONS

PLEASE NOTE: Information provided on this form will be a public record subject to production under the Washington State Public Records Act (Ch. 42.56 RCW). Any personal health information and information that is exempt from disclosure will be redacted prior to public disclosure.

Thank you for your interest in serving on a King County board or commission. Individuals selected to serve on a King County board or commission will also be required to complete a King County Ethics Program Financial Disclosure Form within two weeks of being nominated to serve on a King County board or commission. Individuals appointed to serve on a board or commission that is overseen by an agency independent of King County government are exempt from the financial disclosure filing requirement.

1. I'm Interested in Serving on the (Board or Commission Name):

2. First and Last Name

Preferred Contact Information:

3. Address
4. City, State, Zip Code
5. Home Phone
6. Work Phone
7. Cell Phone
8. Email Address

Note: Please provide your physical home address if it differs from your preferred mailing address. This information is required to verify King County residency.

9. Home Address
10. City, State, Zip Code

Current Employer

11. Job Title
12. Date of Employment
13. Company Name
14. Street Address
15. City, State, Zip Code

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Clear Form

VSHSL Recruitment Packet

Application Form

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KING COUNTY BOARDS AND COMMISSIONS

16. Please check the King County Council District in which you currently reside. If you are unsure of your district, use the following Council District Lookup Tool to find it:

☐District 1 ☐ District 2 ☐ District 3 ☐ District 4 ☐ District 5 ☐ District 6 ☐ District 7
☐ District 8 ☐ District 9 ☐ Not Sure

17. Have you previously served on any other King County board, commission, or committee? If yes, please list those in the space below.

Name of Board, Commission or Committee	Year Appointed	Term Expiration Year

18. Please explain how your experience, skills, and perspective qualify you for this appointment.

19. How did you learn of this opportunity?

20. Do you hold any professional licenses, registrations, or certifications in any field?

☐Yes (Answer question 21) ☐ No (Skip to question 22)

21. If you hold any professional licenses, please list them here:

PERSONAL INFORMATION (OPTIONAL)

22. Race/Ethnicity
23. Gender Identity
24. Preferred Pronouns

25. Do you have a disability as defined by the Americans with Disabilities Act (ADA)?

☐Yes ☐ No

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VSHSL Recruitment Packet

Clear Form

Application Form

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KING COUNTY BOARDS AND COMMISSIONS

26. Please select the age group that best represents you.

☐ 30 or younger ☐ 31-41 ☐ 42-52 ☐ 53-63 ☐ 64-74 ☐ 75 or older

Emergency Contact (Optional):
Please provide the name of a person to notify in the event of an emergency.

27. Name
28. Relationship to Individual
29. Home Phone
30. Work Phone
31. Cell Phone

Agreement and Signature
By submitting this application, I affirm that the information I have provided in this application are true and complete to the best of my knowledge.

32. Type your name
33. Date

Next Steps
Please submit your completed application to the staff liaison overseeing recruitment for the applicable King County board or commission. Applications may be emailed to the Adult Services Division at VSHSL@kingcounty.gov

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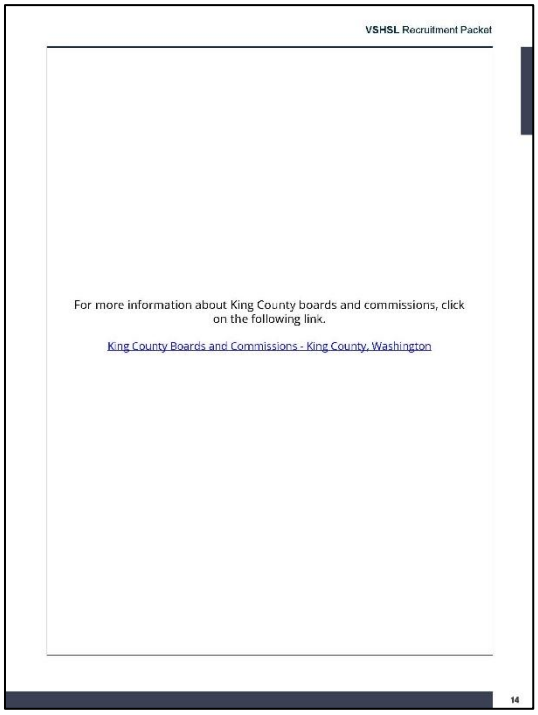

VSHSL Recruitment Packet

For more information about King County boards and commissions, click on the following link.

King County Boards and Commissions - King County, Washington

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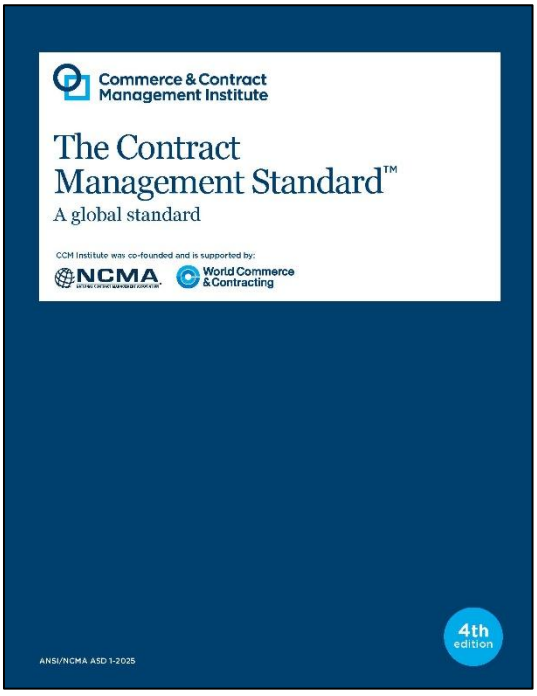
King County Department of Community and Health Services
Adult Services Division
CNK-HS-0500
401 Fifth Avenue, Suite 500
Seattle, WA 98104
www.kingcounty.gov/vshsl
@KingCountyDchs
@KingCountyVetsProgram
King County
DCHS
Department of Community and Human Services
King County
VSHSL
Veterans, Seniors, & Human Services Levy

Contract Management Standard


Commerce & Contract Management Institute

The Contract Management Standard™

A global standard

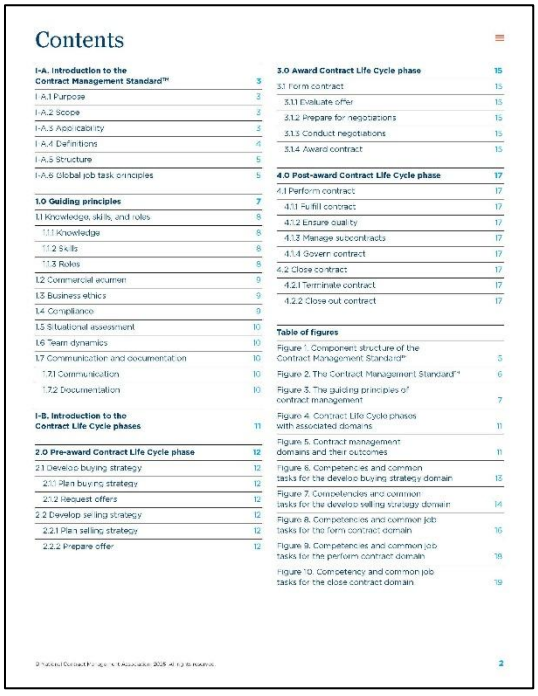
CCM Institute was co-founded and is supported by:

NCMA

World Commerce & Contracting

ANSI/NCMA ASD 1-2025

4th edition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I-A. Introduction to the Contract Management Standard™

The Contract Management Standard™ was updated and reaffirmed through a rigorous global process involving materially affected and interested parties to broaden its relevance to the international marketplace.

Conceptually, the process was based on due process, which was established through consensus, openness, lack of dominance, and a balance of interests. Specifically, the process included a job task analysis survey, expert drafting, peer review, and public comment validation.

- This is an American National Standard approved and reaffirmed by the American National Standards Institute (ANSI),[1] which is the sole United States representative to the International Organization for Standardization (ISO). It is independent of other ANSI and ISO standards, and it is a document established through the consensus-based activities of an accredited, authoritative organization.[2] The common and repeated use of a consensus-based standard will improve productivity, increase efficiency, and reduce costs.[3]
- This is a global standard designed and developed with the entire world in mind to ensure the processes it presents through job tasks, competencies, and domains are internationally suitable, reliable, and of high quality while being applicable in all jurisdictions and markets.
- This is a voluntary consensus standard developed or adopted by voluntary consensus standard bodies through the use of a development process characterized by openness, balance, due process, consensus, and the right to appeals. The inclusiveness and integrity of the ANS process encourages participation by the broadest range of subject-matter experts, resulting in high-quality standards that protect the public and foster fair commerce and innovation.

Effective contract management can produce contracts to serve as strategic enablers to foster business innovation, collaboration, and long-term value creation. The success of buyers and sellers can be assessed not only through direct interaction (e.g. negotiations, contract performance), but also when there is no direct interaction between the parties (e.g. planning). Success of one party is not likely to occur without the success of the other party. Successful contract management is more likely to occur when both parties clearly understand all job tasks, competencies, and deliverables.

I-A.1 Purpose

The purpose of the Contract Management Standard™ is to describe contract management in terms of the processes and stakeholder relationships created through the integration and interaction of job tasks and competencies, and the purposes they serve.

I-A.2 Scope

The scope of the Contract Management Standard™ includes all the contract management processes and business relationships required to develop buying strategies, develop selling strategies, form contracts, perform contracts, and close contracts for the furnishing of goods or services. The primary participants in this process are buyers and sellers in the discipline of contract management; the standard also includes buyer and seller collaboration with stakeholders such as engineering, estimating, finance, legal, logistics, pricing, project management, requirement development, supply chain management, quality control, customers, and others.

I-A.3 Applicability

The Contract Management Standard™ is applicable to:

1. All acquisitions, framework agreements, grants, leases, licenses, orders, procurements, purchases, subcontracts, and any other types of legally enforceable contracts – from simple credit card purchases to complex acquisitions;

2. Any organization that works with any type of contract [e.g. government (jurisdiction, national/federal, state, and local), industry (business-to-business, business-to-government, large business, mid-size business, small business), subcontractors (all tiers)];

3. Any oversight activity involving contract procedural, regulatory, and statutory compliance (e.g. appeals, arbitration, audits, legal opinions and decisions, litigation, performance management reviews, protests, risk assessments, business process improvement/automation);

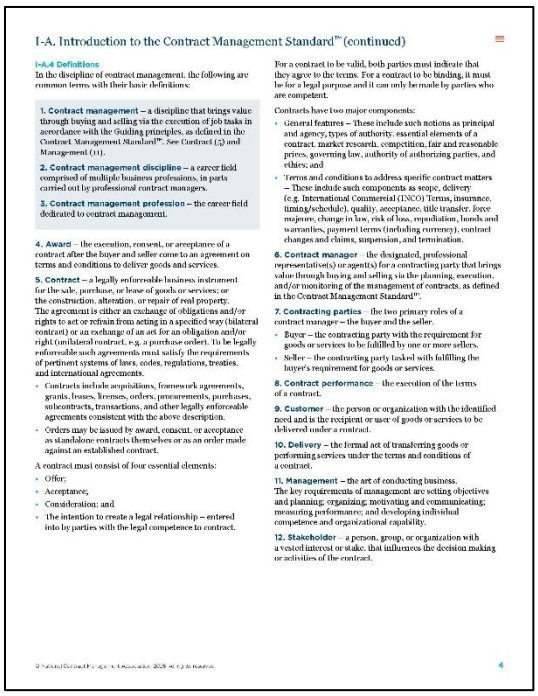
4. Any organization developing training courses and programs or education courses and curricula (e.g. professional associations, universities/colleges, training providers, schools); and

5. Any individual interested in developing and increasing competence or any organization interested in enhancing its workforce and process capability [e.g. focus scarce resources (personnel, money, equipment, time, etc.) to target competence gaps; achieve certification; obtain meaningful results].

1 ANSI operates www.ansi.org

2 ISO develops and publishes global standards. See www.iso.org/standards.html for a description of ISO standards.

3 Source: ANSI at www.ansi.org/about/introduction?menuid=1


I-A. Introduction to the Contract Management Standard™ (continued)

I-A.4 Definitions

In the discipline of contract management, the following are common terms with their basic definitions:

1. Contract management – a discipline that brings value through buying and selling via the execution of job tasks in accordance with the Guiding principles, as defined in the Contract Management Standard™. See Contract (5) and Management (11).

2. Contract management discipline – a career field comprised of multiple business professions, in parts carried out by professional contract managers.

3. Contract management profession – the career field dedicated to contract management.

4. Award – the execution, consent, or acceptance of a contract after the buyer and seller come to an agreement on terms and conditions to deliver goods and services.

5. Contract – a legally enforceable business instrument for the sale, purchase, or lease of goods or services; or the construction, alteration, or repair of real property. The agreement is either an exchange of obligations and/or rights to act or refrain from acting in a specified way (bilateral contract) or an exchange of an act for an obligation and/or right (unilateral contract, e.g. a purchase order). To be legally enforceable such agreements must satisfy the requirements of pertinent systems of laws, codes, regulations, treaties, and international agreements.

- Contracts include acquisitions, framework agreements, grants, leases, licenses, orders, procurements, purchases, subcontracts, transactions, and other legally enforceable agreements consistent with the above description.
- Orders may be issued by award, consent, or acceptance as standalone contracts themselves or as an order made against an established contract.

A contract must consist of four essential elements:

- Offer;
- Acceptance;
- Consideration; and
- The intention to create a legal relationship – entered into by parties with the legal competence to contract.

For a contract to be valid, both parties must indicate that they agree to the terms. For a contract to be binding, it must be for a legal purpose and it can only be made by parties who are competent.

Contracts have two major components:

- General features – These include such notions as principal and agency, types of authority, essential elements of a contract, market research, competition, fair and reasonable prices, governing law, authority of authorizing parties, and ethics; and
- Terms and conditions to address specific contract matters – These include such components as scope, delivery (e.g. International Commercial (INCO) Terms, insurance, timing/schedule), quality, acceptance, title transfer, force majeure, change in law, risk of loss, repudiation, bonds and warranties, payment terms (including currency), contract changes and claims, suspension, and termination.

6. Contract manager – the designated, professional representative(s) or agent(s) for a contracting party that brings value through buying and selling via the planning, execution, and/or monitoring of the management of contracts, as defined in the Contract Management Standard™.

7. Contracting parties – the two primary roles of a contract manager – the buyer and the seller.

- Buyer – the contracting party with the requirement for goods or services to be fulfilled by one or more sellers.
- Seller – the contracting party tasked with fulfilling the buyer's requirement for goods or services.

8. Contract performance – the execution of the terms of a contract.

9. Customer – the person or organization with the identified need and is the recipient or user of goods or services to be delivered under a contract.

10. Delivery – the formal act of transferring goods or performing services under the terms and conditions of a contract.

11. Management – the art of conducting business. The key requirements of management are setting objectives and planning; organizing; motivating and communicating; measuring performance; and developing individual competence and organizational capability.

12. Stakeholder – a person, group, or organization with a vested interest or stake, that influences the decision making or activities of the contract.

I-A. Introduction to the Contract Management Standard™ (continued)

I-A.5 Structure
The Contract Management Standard™ structure is comprised of five components (see Figure 1):

1. Guiding principles – These principles apply to all phases of the Contract Life Cycle.

2. Contract Life Cycle phases – The phases of a contract: Pre-award; Award; and Post-award.

3. Domains – The areas within a Contract Life Cycle phase that produce significant contract management outcomes.

4. Competencies – The processes utilized to produce the expected contract management outcomes of the domains. These processes involve the ability to perform multiple job tasks, both simultaneously and sequentially, while achieving meaningful results.

5. Job tasks – The tasks to be performed on a best practice basis by contract managers. Such job tasks are systematically processed to achieve the expected results of the competencies. Though the job tasks are presented as lists, contract management professionals are expected to skillfully process them concurrently or sequentially, as appropriate, throughout the Contract Life Cycle.

Figure 1. Component structure of the Contract Management Standard™

I-A.6 Global job task principles
The following principles provide the perspective and intent of the consensus body as it designed and developed the job tasks for each phase of the Contract Life Cycle:

1. Job tasks describe a process and are not designed to be assigned to, nor describe, any specific role, function, or department of a buying or selling organization (including stakeholders, customers, suppliers, etc.).

2. The buyer and seller describe the organizations composing the buy-side and sell-side of a transaction.

3. Job tasks are worded in such a way as to be, as far as possible, universally applicable. This means that they do not attempt to align to any particular region, industry, customer, or contracting model. To this end, language has been kept clear and simple, and terminology was selected so as to be easily translated across languages to facilitate a common understanding of the intent of each job task.

4. The job tasks describe the 'what' (i.e. those high level), core activities, that are central to exercising the global contract management discipline in regional and local practice. Job tasks do not describe the 'how' (i.e. the behaviors), skills, and expectations placed on individuals and teams who conduct the job tasks – the 'how' is addressed in the Guiding principles section.

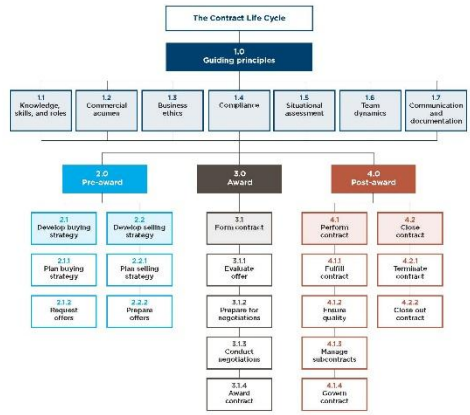
5. Job tasks may not all be applicable to every industry or region. It should be noted that the job tasks should not be interpreted as a strictly linear process; some steps may not apply, or some steps may comprise greater complexity, for some over others.

6. Job tasks are flexible in terms of application, adaptability, and keeping pace with rapid and continuous development in various aspects (e.g. technology, legislation, transactions, dealings, etc.).

I-A. Introduction to the Contract Management Standard™ (continued)

The Contract Management Standard™ is established as presented in Figure 2.

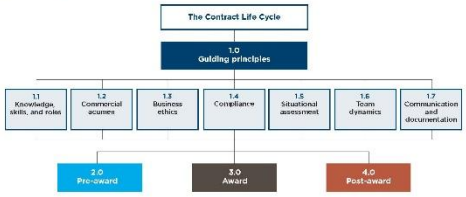
Figure 2. The Contract Management Standard™



1.0 Guiding principles

Guiding principles apply throughout all phases of the Contract Life Cycle. They provide the framework of behaviors and approach to conducting contract management by contract managers or delegated personnel. Simply put, while the processes describe what contract managers commonly do, the guiding principles describe how contract management should be conducted (see Figure 3).

Figure 3. The guiding principles of contract management



1.0 Guiding principles (continued)

1.1 Knowledge, skills, and roles
Contract management requires learning a body of knowledge, using a broad and unique set of skills, and performing several roles.

1.1.1 Knowledge
Contract management requires learning a body of knowledge, which is a special knowledge gained through research, academic study, training, certification, and continuous learning. The Contract Management Standard™ informs what is included in this body of knowledge. There are many sources of the contract management body of knowledge including government, industry, academia, legal bodies, associations, and international bodies. Contract managers apply the contract management body of knowledge to achieve the goals of the stakeholders and the contract management discipline.

1.1.2 Skills
Skill is the ability to use one's knowledge effectively and readily in execution or performance. Proficiency in a skill is typically characterized by years of experience, a degree of competence, the results achieved, and the manner of achievement. Contract management requires skills in the following areas. The words inside the parenthesis are some examples of the application of the skill and are not to be interpreted as a comprehensive list of applications of that skill:

1. Agency (fiduciary responsibility, duties, authority);
2. Budgeting (spending plan, income, expenses, allocation of resources, tracking);
3. Business capture (teaming, proprietary agreements);
4. Business ethics (adherence, resolving gray areas);
5. Collaboration with other contract management professionals (including project, technical, financial, supply chain, quality, legal, property, data, information technology);
6. Communicating (written, oral, visual);
7. Compliance with requirements (legal, regulatory, organizational, contractual);
8. Contract formation (statement of work requirements, terms and conditions, offer, acceptance, consideration, valid purpose, legality);
9. Contract interpretation (rules, order of precedent, case law);
10. Contract performance (price/cost, technical, delivery, closeout);
11. Conflict resolution (contract interpretation, claims, disputes);
12. Due diligence (exercise of care, transaction);
13. Negotiations (good faith, principled, interest-based bargaining);
14. Leading (vision, mission, guide, influence, emotional intelligence, alignment to organizational goals);
15. Personal initiative (timely decisions within authority, advise others outside their authority);
16. Planning (strategic, operational, contract required);
17. Process improvement (effectiveness, efficiency, metrics, measurement, innovation);
18. Relationship management (customers, stakeholders, internally, externally);
19. Request analysis and evaluation (price, cost, technical, best value);
20. Requesting (work requirements, terms and conditions, contract type, methods);
21. Responding (price, technical, value proposition, compliance to requirements, responsiveness);
22. Risk management (assessment, strategies);
23. Sound professional judgment (acumen, objectivity, experience, determinations, findings, justifications, approvals, memoranda);
24. Sourcing (make or buy, market research, business relationship, responsibility);
25. Staffing (organizing, hiring, developing, training, coaching, mentoring).

1.1.3 Roles
Contract managers use their contract management skills to accomplish the roles they are assigned. A role is a set of responsibilities or duties that a person is expected to perform within a certain position or job. While there is some overlap between roles and skills, roles define broad job functions, while skills specify abilities. A role can require multiple skills, and a single skill can be useful in multiple roles.

Roles can be organized into three broad categories:

1. **Interpersonal roles** – These are responsibilities related to interacting with team members and stakeholders. This includes figurehead, leader, and liaison.
2. **Informational roles** – This category describes the duties for processing, generating, and exchanging information to reach organizational goals. This includes monitor, disseminator, and spokesperson.
3. **Decisional roles** – These roles involve using available information to make strategic business decisions. This includes negotiator, disturbance handler, resource allocator, and entrepreneur.

1.2 Commercial acumen

Commercial acumen describes the process knowledge of strategic governance and oversight of contractual relationships in the context of the organization's intended outcomes, buyer and seller objectives and capabilities, market conditions, commercial risk management, and other elements comprising the overall context in which the contracts are formed and managed. Commercial acumen therefore comprises all areas of professional practice that are relevant to conducting commerce, insofar as they are of direct relevance to the structuring, content, and performance of contracts.

The 'commercial process' is therefore to ensure that all relevant stakeholder views have been incorporated and evaluated, to ensure that the needs (of the buyer/customer) and capabilities (of the seller and subcontractors) have been aligned, monitoring and evaluating the performance of a contract consistent with the organization's strategic goals and objectives, and ensuring that the buyer and seller are capable of delivering the intended outcomes of the contract.

In this sense, the contract may be viewed as a tool to undertake and oversee 'commercial assurance' of a deal or commercial relationship, and this may be from either a buyer or seller perspective.

Commercial acumen is a critical skill set for creating and maintaining contractual relationships, for performing contract management job tasks, and for aligning and achieving the strategic objectives of the buyer or seller.

1.3 Business ethics

Business ethics are principles that guide decision making. They are a guide to what is right or wrong for a business situation. The principles provide a shared way of addressing business situations. These principles may be called a code, standard, or practice. Most principles require business to be conducted with confidentiality, fairness, openness, respect, and trust.

To achieve this goal, the principles commonly address accountability, compliance, confidentiality, good faith, integrity, and professionalism. Principles commonly specify prohibited behavior. Principles also provide guidance and resources for reporting and resolving business ethics issues.

Contract management requires business ethics because contract management is in service to the interest of others. Contract managers serve their organization while maintaining the trust of stakeholders and ensuring confidence in the integrity of the contract management process.

Contract managers adhere to the business ethics of their organization, their contracts, and their professional business associations. The contract manager makes decisions and resolves ethical issues by applying these principles to the situation at hand.

A code of ethics is an essential element of any profession. Adhering to business ethics builds trust in and preserves the integrity of the contract management process. It also holds contract managers and contracting organizations accountable for their actions. Business ethics help avoid the loss of jobs and business, reputational harm, and civil and criminal penalties.

1.4 Compliance

A key contract management skill is compliance with applicable laws, government regulations, contracts, politics, and business ethics. Compliance with multiple requirements can occur throughout the Contract Life Cycle.

Contract managers have compliance responsibilities regarding business ethics, prevention, internal control systems, monitoring, auditing, reporting, investigating, enforcement, discipline, and corrective action.

To be compliant with requirements, contract managers must have a working knowledge of the laws, codes, regulations, policies, and other sources of guidance that define the environment in which the contract manager operates. Also, it is crucial for the contract manager to know when and how to access specific legal advisory services to support contract objectives.

Furthermore, it is essential for the contract manager to abide by and advocate for all local and international compliance regulations, including trade compliance and trade control laws, copyright laws, privacy and data protection, cyber and physical security, and anti-trust and anti-competition regulations.

1.5 Situational assessment

Leveraging lessons learned to manage current and future contracts is a crucial responsibility in contract management. Successful contract managers:

1. Capture, document, and share knowledge effectively;
2. Apply learning from past contracts through documented lessons learned;
3. Shape and manage requirements to align with an organization's vision, mission, and strategic goals;
4. Recognize how seemingly independent contract actions impact each other now and in the future;
5. Understand product and systems life cycle principles;
6. Use market research techniques to collect, analyze, and implement market intelligence;
7. Identify and implement opportunities for process improvement and optimization;
8. Seek subject matter experts for input and insight;
9. Ensure the closure of contract management processes within defined time limits; and
10. Negotiate meaningful contract terms and conditions that meet the needs of customers and stakeholders.

1.6 Team dynamics

The buyer and seller teams combine the functional disciplines of buyers and sellers for the common purpose of satisfying customer needs. While buyer and seller teams may work independently in the pre-award phase, the relationship becomes formal upon contract award and continues as a single team until the contract is closed. Members of the buyer and seller teams are expected to add value by performing their functions and knowing their roles throughout the Contract Life Cycle phases.

To be successful, each member must have a working knowledge of all stakeholder roles on the team. The roles with whom the contract manager will likely interact can include engineering and technology, sales and account management, finance, legal, logistics, project management, procurement, supply chain, quality control, and others. Buyer and seller teams may include members internal to their organization and/or external representatives.

Familiarity with each role helps the team work cohesively, identifying gaps or overlaps in responsibilities and ensuring seamless operations.

The buyer and seller teams must be able to:

1. Conduct meaningful collaboration to make accurate and timely decisions while solving complex contracting problems and forming an effective contract relationship;
2. Identify opportunities for process improvement and optimization; and
3. Collect and record lessons learned.

1.7 Communication and documentation

1.7.1 Communication

Effective communication among all affected parties is crucial for ensuring contract management outcomes. Communication must:

1. Minimize the effect of personal biases;
2. Maximize the likelihood of accurate results; and
3. Facilitate communication among affected parties.

1.7.2 Documentation

Contract managers facilitate communication through clear, concise documentation and unambiguous processes. Documentation is often prepared, recorded, and retained in appropriate systems, regardless of medium, to support decisions made and actions taken. Examples of topics to document include, but are not limited to:

1. Contracts and the planning strategy leading to a contract;
2. Verbal and nonverbal exchanges;
3. Rationale used in decision making and business judgment;
4. Mutually agreed-upon expectations;
5. Planned and unplanned events;
6. Performance issues and accountability;
7. Conflicts and their resolutions;
8. Changes and proposed solutions;
9. Risk management and mitigation;
10. Opportunity development and execution;
11. Contract compliance and performance quality;
12. Buyer and seller relationship management programs; and
13. Knowledge gained and lessons learned.

I-B. Introduction to the Contract Life Cycle phases

Contracts have a distinct beginning and end, and the Contract Life Cycle defines these parameters. The Contract Life Cycle generally consists of three contract phases: 2.0 Pre-award, 3.0 Award, and 4.0 Post-award.

Contract management processes performed by contract managers generally fall into five domains within the three Contract Life Cycle phases. Figure 4 illustrates how the domains relate to the life cycle phases, and Figure 5 illustrates the domains and their outcomes. Each Contract Life Cycle phase and domain have specific competencies and job tasks that together are called 'processes'.

Figure 4. Contract Life Cycle phases with associated domains

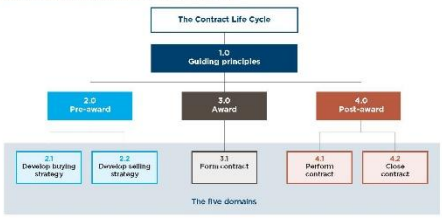


Figure 5. Contract management domains and their outcomes

2.0 Pre-award Contract Life Cycle phase

Pre-award is the first phase of the Contract Life Cycle. The pre-award process involves the contract management functions of 'contract planning' and includes the business processes for buyers to produce requests and sellers to prepare offers.

There are two domains within the pre-award life cycle phase:

2.1 Develop buying strategy – The buyer competencies for this domain are 'Plan buying strategy' and 'Request offers'.

2.2 Develop selling strategy – The seller competencies for this domain are 'Plan selling strategy' and 'Prepare offer'.

The processes in the pre-award life cycle phase interact with each other and continuously integrate with the Guiding principles. In addition, the pre-award processes have a direct impact on the performance and results of the award and post-award life cycle phases. The domains, competencies, and common job tasks in the pre-award life cycle phase are presented in Figure 6 (buyer) and Figure 7 (seller).

2.1 Develop buying strategy

Develop buying strategy is primarily the domain of the buyer. It contains the processes of describing all the elements of the customer requirements (technical, business, regulatory, etc.) to the sellers. The value added by this domain is the accurate presentation of the customer requirement through a buying strategy leading to responsive offers and resulting in successful contract performance.

2.1.1 Plan buying strategy

Plan buying strategy is the process by which efforts of all personnel responsible for acquiring goods or services are coordinated and integrated through a comprehensive plan for fulfilling the customer's need(s) in a timely manner at a reasonable price. It includes developing the overall strategy for managing the buying process.

2.1.2 Request offers

Request offers is the process of implementing the plan by soliciting responses from sellers in order to fulfill a customer need. It produces a clear and concise buying strategy that effectively communicates all the buyer's requirements and enables the sellers to provide comprehensive, responsive offers.

2.2 Develop selling strategy

Develop selling strategy is primarily the domain of the seller. It contains the processes of applying business practices and developing strategies to pursue and obtain contract award. The value added by this domain is in developing an offer with the intent of entering into a contract subject to any changes arising during the Form contract domain.

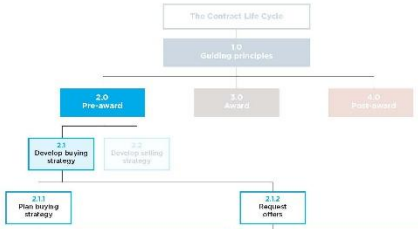
2.2.1 Plan selling strategy

Plan selling strategy is the process of understanding the buyer's needs aligned to the seller's organizational goals, assessing the market (including potential partners, suppliers, and competitors), determining the proposed offer governance model (prime contractor, consortium, joint venture, etc.), and organizing pre-sales offer activities to plan for the preparation of the offer.

2.2.2 Prepare offer

Prepare offer is the process of executing the selling strategy through developing a compelling offer aimed at winning the contract. The skillful application of common job tasks in preparing an offer will enhance both risk management and opportunity capitalization by clearly demonstrating the seller's capability, compliance to requirements and terms, and any assumptions or dependencies.

Figure 6. Competencies and common tasks for the develop buying strategy domain



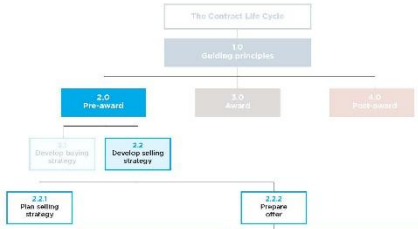
Buyer job tasks:

1. **Shape requirements**
   a. Consider outcomes analysis
   b. Re-form needs assessment
   c. Draft requirements and scope
   d. Identify internal response (co, accountable, consulted, and informed (RACI) stakeholders
   e. Verify availability of funds and resources
2. **Conduct market research**
   a. Identify potential products and/or services
   b. Identify potential suppliers
   c. Analyze market conditions
   d. Gather data on industry standards, pricing, innovation, opportunities, and trends
   e. Identify supply chain constraints
3. **Formulate contracting approach and strategy**
   a. Conduct make or buy assessment
   b. Determine buyer inputs and obligations
   c. Select appropriate contract format/method type
   d. Finalize requirements and scope
   e. Conduct early market engagement or communications
   f. Develop risk register
   g. Establish evaluation criteria and scoring methods for offers
   h. Consider pre-contractual documents
4. **Finalize buying strategy**
   a. Finalize buying plan
   b. Obtain internal approvals

Buyer job tasks:

1. **Prepare buying request**
   a. Respond to questions from potential sellers
   b. Incorporate proposed contract terms, scope, and requirements
   c. Determine need for pre-offer review
   d. Prepare terms and conditions of the request
2. **Review and obtain approvals of the request**
3. **Issue buying request**
   a. Determine need to publicize buying request
   b. Issue buying request to potential sellers
4. **Respond to seller communications**
5. **Amend buying request**
6. **Coordinate and manage hand-over to evaluation team**
7. **Document develop buying strategy lessons**

Figure 7. Competencies and common tasks for the develop selling strategy domain



Sellers job tasks:

1. **Provide market related inputs to pre-selling activities**
2. **Create cross-functional team to respond to buyer request**
3. **Conduct pre-selling activities**
   a. Assess buyer relationships
   b. Complete pre qualification requirements
   c. Assess solution strategy
   d. Assess pricing strategy
   e. Assess marketing strategy
   f. Assess competition
   g. Secure pre-sales budget
   h. Assess contract strategy
   i. Assess commercial strategy
4. **Evaluate buyer request**
   a. Evaluate request and ability to deliver requirements
   b. Conduct buyer due diligence
   c. Request clarification
   d. Propose changes to buyer
   e. Determine optimal offer strategy
   f. Assess gaps in capability
   g. Determine selling model including partnering options
   h. Determine subcontracting needs
5. **Conduct offer/no-offer analysis**
   a. Decide on offer/no offer
   b. Obtain internal approvals
6. **Finalize selling strategy**

Sellers job tasks:

1. **Develop execution plan**
   a. Understand unique and special requirements
   b. Assess capability to satisfy all requirements of the request
2. **Develop risk management strategy**
   a. Identify risks
   b. Evaluate risks
   c. Develop risk management plans
   d. Identify contractual risk impacts on price and cost
   e. Determine inconsistency risk
   f. Apply appropriate risk management strategy to offer
3. **Determine pricing strategy**
4. **Determine contract terms**
   a. Develop proposed terms
   b. Develop compliance response to buyers proposed terms
5. **Assess development of product or service technical approach**
6. **Execute selling model**
7. **Participate in buyer communications**
8. **Pre-submission evaluation**
   a. Finalize sales strategy
   b. Decide to submit offer
   c. Obtain internal approval to submit offer
9. **Finalize offer**
   a. Submit offer
   b. Verify receipt

3.0 Award Contract Life Cycle phase

The second Contract Life Cycle phase is Award. The award process involves the contract management functions known as 'contract formation' and reflects all the business processes performed by both the buyer and seller that produces an awarded contract. Some contracts are very simple, and others are exceedingly complex, but the majority fall somewhere in between.

The processes in the award life cycle phase interact with each other and are continuously integrated with the Guiding principles. In addition, the results of the processes of the award life cycle phase are directly impacted by the cumulative effect of the processes and results in the pre-award life cycle phase, and they will have a direct impact on the performance and results of the processes in the post-award life cycle phase. The domain, competencies, and common job tasks in the award life cycle phase are presented in Figure 8.

There is one domain in the award phase:

3.1 Form contract – The processes involved in the Form contract domain produce the contract.

3.1 Form contract

Form contract involves the process of evaluating the offer, planning for and conducting negotiations, selecting the source, and awarding the contract.

The value added by this domain is in mitigating or eliminating contract performance risk by determining reasonable cost and pricing; assessing commercial and contractual conditions; negotiating prices, terms, and conditions; and selecting the best source.

3.1.1 Evaluate offer

Evaluate offer is the process of analyzing submitted offers in accordance with the buying request evaluation criteria to select the source that has the highest probability of satisfactory contract performance. This process involves mitigating buyer risk by selecting the offeror most likely to satisfactorily perform the contract and assures the seller of a consistent and fair selection process. The buyer should also evaluate 1) the contract harmonization of clauses and processes, and 2) the overall coherence with the other potential or existing contracts (e.g. with its own customer, its partners, its other suppliers, etc.).

3.1.2 Prepare for negotiations

Prepare for negotiations is the process of preparing for interaction between the buyer and seller regarding all aspects of the offer and its terms, and often involves clarifying requirements and parties requesting changes or consideration of an alternate approach that may be consistent with the buying strategy requirements. This process involves selecting offers for negotiation, assessing offer analysis, preparing negotiations, issuing notice of negotiations to offerors, amending offers, and withdrawing offers.

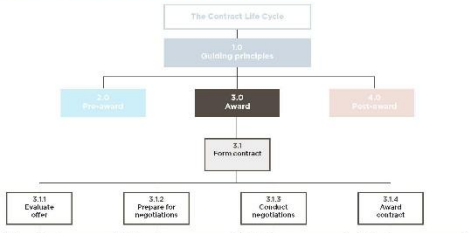
3.1.3 Conduct negotiations

Conduct negotiations is the interaction between the buyer and seller regarding all aspects of the offer and its terms, and often involves clarifying requirements and parties requesting changes or consideration of an alternate approach that may be consistent with the buying strategy requirements. This interaction involves both parties collaborating to find common ground or offer compromises among their differences in quantity, price, delivery, quality, governing laws, contract period, or other factors.

3.1.4 Award contract

Award contract is the process of the buyer and seller executing a contract after coming to an agreement on the terms and conditions to deliver goods and services. This process involves selecting the successful offeror, finalizing the contract award, and managing disagreements.

Figure 8. Competencies and common job tasks for the form contract domain



Buyers job tasks:

1. **Review offer**
   a. Evaluate due diligence
   b. Exclude unqualified offers
2. **Evaluate offeror ability to perform**
   a. Perform offer deficiency analysis
   b. Evaluate non-priced factors
   c. Perform price analysis
   d. Perform cost analysis
   e. Consider total cost of ownership
   f. Evaluate risk management strategies
3. **Perform contingencies analysis**
4. **Document analysis results**
   a. Request clarifications
5. **Obtain internal approvals**

Job tasks:

1. **Select offers for negotiation (B)**
   a. Issue notices to all offerors
2. **Assess offer analyses (B)**
   a. Identify strengths, weaknesses, and gaps in each selected offer
   b. Develop strategies to manage strengths, weaknesses, and gaps
3. **Prepare negotiations (J)**
   a. Document negotiation objectives
   b. Prepare negotiation strategies
   c. Obtain internal approvals
4. **Issue notice of negotiations to offerors (B)**
5. **Amend offers (S)**
6. **Withdraw offers (S)**

Job tasks:

1. **Conduct negotiations (J)**
   a. Agree to and document changes to offer (S)
   b. Determine impact to contract (B)
2. **Finalize negotiations (J)**
   a. Obtain approvals (J)
   b. Request final offer revision (B)
   c. Submit best and final offer (S)
   d. Evaluate offers (B)

Job tasks:

1. **Select successful offerors (B)**
   a. Document basis for award
   b. Issue notice of selection
   c. Notify unsuccessful offerors
   d. Debrief offerors
2. **Prepare final contract (J)**
3. **Finalize contract award (B)**
   a. Obtain internal approval
   b. Issue contract
4. **Manage disagreements (J)**
   a. Submit protests and appeals (S)
   b. Respond to protests and appeals (B)
5. **Review unsuccessful offer (S)**
   a. Receive debrief
   b. Document lessons learned
   c. Notify stakeholders
   d. Close pre-sales budget

(B) = Buyer
(S) = Seller
(J) = Joint responsibility

4.0 Post-award Contract Life Cycle phase

4.0 Post-award Life Cycle phase

Once the award phase is completed, the post-award Contract Life Cycle phase begins. This involves the contract management functions known as 'contract execution' and 'contract closeout'. The specific management of the contract tasks will vary greatly depending on the complexity of the contract. Both the buyer and seller are actively involved in the execution of the contract to ensure satisfactory performance and to bring the contract to a successful conclusion.

There are two domains within the post-award phase:

4.1 Perform contract – The job tasks and competencies for this domain produce the contract performance (see Figure 9).

4.2 Close contract – The job tasks and competencies for this domain produce the closed contract (see Figure 10).

The post-award processes interact with each other, and they continuously integrate with the Guiding principles. Post-award processes and results are directly impacted by the cumulative effort of the performance and results from the pre-award and award processes.

4.1 Perform contract

Perform contract involves the process of executing both technical and non-technical contract requirements, managing business relationships, ensuring quality, conforming payment obligations are met, and managing changes.

The value added by this process is in monitoring risk, assessing its impact on contract performance, and ensuring compliance with contractual terms and conditions during contract performance up to contract closeout or termination.

4.1.1 Fulfill contract

Fulfill contract is the process of managing remedies and dependencies, maintaining communication channels, processing contract documentation, and managing contract performance.

This process involves building and maintaining a contractual relationship to managing risk and ensuring compliance with contract terms, increasing the likelihood of mutually expected contract performance and achievement of intended goals.[4]

4.1.2 Ensure quality

Ensure quality is the process of planning for contract performance and delivery, monitoring performance, and inspecting and accepting contract deliverables.

This process involves ensuring the delivered goods or services meet the specifications, terms, and conditions of the contract.

4.1.3 Manage subcontracts

Manage subcontracts is the process of planning, awarding, and managing subordinate contracts determined necessary to support and successfully fulfill the prime contract.
The subcontracting process aligns to and is integrated with the pre-award, award, and post-award life cycle phases, domains, competencies, job tasks, and Guiding principles applicable to the prime contract.

Though managing subcontracts takes place during the post-award life cycle phase of a contract, the need for subcontracting is typically determined in the pre-award life cycle phase.

The same contract/subcontract manager or organization can perform both buyer and seller processes to successfully fulfill the prime contract.[5]

4.1.4 Govern contract

Govern contract is the process of initiating, negotiating, and executing contract changes while keeping control of the contract's overall structure and performance.

This process allows flexibility in making necessary contract changes while protecting the integrity of the contract and intended outcomes.

Though managing changes, remedies, and disputes occur during the post-award life cycle phase of a contract, the Guiding principles, Contract Life Cycle processes, and significant outcomes are applicable to contract modifications.

4.2 Close contract

The Close contract domain is the domain of both the buyer and seller. It involves the process of verifying all the requirements of the contract are satisfied, settling unresolved matters, and reconciling the contract to make final payment.

The value added by this process is in determining that the buyer and seller contract obligations have all been satisfied and any and all liabilities discharged by both parties (see Figure 10).

4.2.1 Terminate contract

Terminate contract is the process ending a contract partially or completely prior to the performance being completed.

This process includes issuing a termination notice, settling contract obligations, and preparing contract termination documents.

4.2.2 Close out contract

Close out contract is the process of ensuring all performance has been accomplished, final performance has been evaluated, final payment has been made, and the contract has been reconciled. This includes finalization of any transition activities and survivable obligations.

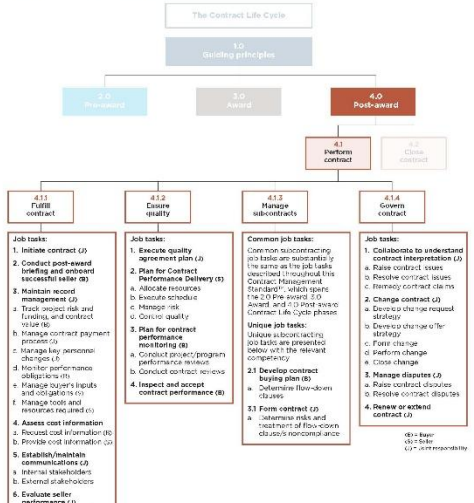
This process involves the completion, delivery, and acceptance of the contract requirement(s) in accordance with the terms and conditions of the contract.

[4] Fulfill contract is part of the necessary processes to help verify the expected contract performance will achieve a positive return on investment. For consistency, both the buyer and seller use the term contract management to refer to the overall effort to manage the contract to satisfactory completion, including monitoring, reporting, and taking corrective action as needed. Contract management processes are performed throughout the contract's period of performance and are typically performed in parallel with, or as a part of, other project management processes.

[5] For example:
- A construction contractor may subcontract the electrical work of the project to a subcontractor.
- A software development company may subcontract the development of a specific software module to another company.
- A financial institution may subcontract the management of its investment portfolio to a third-party investment firm.

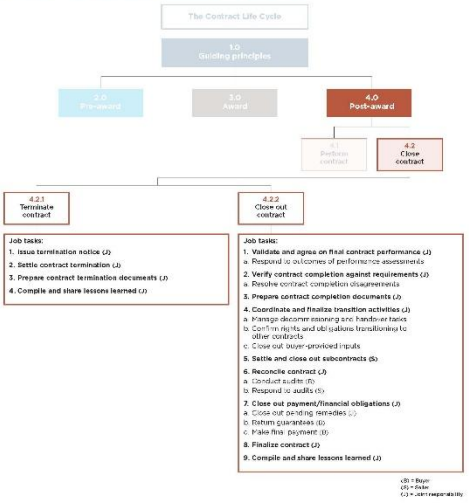
4.0 Post-award Contract Life Cycle phase (continued)

Figure 9. Competencies and common job tasks for the perform contract domain



4.0 Post-award Contract Life Cycle phase (continued)

Figure 10. Competency and common job tasks for the close contract domain



About the Institute

Commerce & Contract Management Institute

The Institute seeks to improve the world through higher standards in buying and selling. Our rigorous, practical research and insights, both relevant and useful, shape global policy and practice. We help society by driving up standards for the exchange of goods and services, resulting in better trading outcomes in both the private and public sectors.
As a not-for-profit organization, we were founded, and are supported, by World Commerce & Contracting and NCMA.

General or media enquiries
info@ccm.institute

For further information see the WorldCC website

Commerce & Contract Management Institute

About the founders

CCM Institute was co-founded and is supported by:

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WorldCC is a not-for-profit association dedicated to helping its global members achieve high performing and trusted trading relationships. With 80,000 members from over 90,000 companies across 180 countries worldwide, the association welcomes everyone with an interest in better contracting; business leaders, practitioners, experts and newcomers. **www.worldcc.com**

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NCMA

Open Discussion

January 2026 Board Meeting Packet

2026 Meetings

January 2026 Board Meeting Packet

2025 Meetings

Facilitator: Staff

Purpose: The purpose of this Upcoming Meetings section is to provide clarity on scheduled meetings and presentations.

Date	Time	Scheduled Business
Thursday, February 19, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, March 19, 2026	4:00 pm to 5:30 pm	Presentation(s): TBD
Thursday, April 16, 2026	4:00 pm to 5:30 pm	Presentation(s): TBD
Thursday, May 21, 2026	4:00 pm to 5:30 pm	Presentation(s): TBD
Thursday, June 18, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, July 16, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, August 20, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, September 17, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, October 22, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, November 19, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD
Thursday, December 17, 2026	4:00 pm to 5:30 pm	Presentation(s): • TBD