

CEO Corner

When does one year begin and the other end?

For PHFE the answer is usually, the year ends June 30th and a new one begins July 1st.

This is because PHFE operates on a July 1st fiscal year, like the state of California and many of our other government and non government partners.

So while we're in the middle of the calendar year we're in the process of closing up our past year of business.

The articles in this month's Crossroads talk about various aspects of PHFE activities related

to the end of one year and the beginning of another.

This June marks the first full year in PHFE's new headquarters, which at once feels brand new and at the same time like we have always been here.

While wishing everyone a happy new year would seem out of context, I do want to thank the PHFE staff, board and partners for a great year.

I'm looking forward to what the future holds for all of us.

-Mark Bertler, CEO

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News and Events for June

June 2010

Men's Health Month

National Children's Dental Health Month

6/7/2010 to 6/9/2010

National Network of Public Health Institutes

New Orleans

6/17/2010

OCHPRIO Board Meeting

6/27/2010

Natioanl HIV Testing Day

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Fiscal Commentary A Cyclical Turn of Events

PHFE's Fiscal Department has certain cyclical events and some non-cyclical. Some of the non-cyclical were described in our May issue. As part of its cyclical projects, PHFE undergoes an annual audit. This is an organization-wide audit (referred to as a "single audit") that covers the entire organization. The Fiscal and HR Departments are very busy preparing information relative to the audit during the Summer months and into the Fall. The audit is presented at the November board meeting and filed with the government shortly thereafter. PHFE is proud of its unqualified opinion from its external auditor for the period ending June 30, 2009 and for many prior years.

As the calendar year comes to a close, PHFE's Fiscal Department conducts a careful review of its vendors in preparation for issuing 1099s in January of the following year. As a regular practice, PHFE requires a W-2 be completed for all of its vendors. Vendors performing a service must complete a questionnaire so that a determination can be made whether a vendor is an Independent Contractor, (IC), or an employee. If it is determined that the vendor is an IC, then a standard PHFE agreement is issued to the IC and a statement of work included for that relationship. PHFE spends the Fall and into the Winter, reviewing our vendors to ensure they are appropriately classified. 1099s are issued during the month of January and filed with the government electronically in March.

Moving from the Winter and into the Spring, the preparation of the

organization's tax return (990, 199 and Charitable organization filing) is completed. Much of the information is compiled using the data from the audited financial statements and other data is gathered such as charitable donations and salaries of certain key staff of the organization. This filing is generally due 5 months following the end of the organization's fiscal year, however 2 extensions can be requested for a final filing no later than May 15.

PHFE's organizational budget is developed during the Spring for presentation to the board at its May meeting. Data is gathered for the portion of our program's budgets as well as the headquarters' budget. Much of our staff is involved in this process as well as our programs. Our Contract Managers and Budget Analysts work closely together with program staff to assist us in determining funding levels and potential opportunities. PHFE collaboratively puts together a very conservative budget and is proud to say that it usually meets or exceeds our original projections.

As part of PHFE's continued effort to be efficient and meet all of our contractual and governmental requirements we are constantly developing and implementing new processes and policies to increase performance and accountability. We are looking toward implementing a new, fully integrated, CRM system. This system will allow us to electronically track our contractual requirements. We look forward to reporting on the progress of this system over the next several months.

-Susan Vacko, Director of Operations

Contract Management Currents

TO DO LIST 2009-2010 ✓ Completed!

Several projects have been successfully completed during the 2009-2010 fiscal year and many more are scheduled for completion in the 2010-2011 fiscal year. The Contract Managers' along with the rest of PHFE are eager to continue to foster a culture of exceptional service across the PHFE Enterprise. This quest starts with our new clients and continues through our programs that have worked with PHFE for numerous years. As PHFE's 2009/2010 fiscal year comes to an end it is without a doubt a year that exemplified that expectation. The main question, are we on the path that Mark has been leading us on for the past two years? In Mark's CEO Blog May 19, 2010 Changes Pace and Small Successes he writes how "The organization has embraced and made great strides in establishing a more transparent and supportive culture as well as improving accountability and consistency across all of our activities." "The one area I feel we haven't made as much progress on is becoming more visible as an enterprise nationally."

This leads me to believe that this will be added to our 2010/2011 to do list. A few other tasks on the CM's to do list that are in process and/or have been completed they are; The Contract Managers are more than half way through our study group sessions for the Certified Professional Contract Manager (CPCM) exam through the National Contract Management Association (NCMA), revamping our marketing materials for new and existing clients, increased effective tools and resources for site visits such as our new CD that incorporates PHFE's policies, procedures and site visit presentation from team departments. Along with, working with, our legal counsel to standardize our agreement templates. So as we all row in the same direction, PHFE will continue to strive to continue providing unique solutions to our unique programs.

-Rochelle McLaurin, MBA
Contract Manager

HR Scoop

Another year come and gone...

Another year has come and will soon be gone. PHFE works on a fiscal calendar of July 1 to June 30th. We are in the process of wrapping up another year. In looking back, it was another busy year with a lot accomplished.

In Human Resources, we began the year running as we entered into our annual benefit enrollment period. We went through a change of carriers which required extra explanation for impacted employees. However, we were pleased to be able to keep the cost increases to a minimum.

We went through an ERP system upgrade. This upgrade brought enhancements such as integration between our web based time collection system and the Employee Self Service System, making it a single sign on for the employee. The upgrade allows us to utilize automatic tracking to ensure better wage and hour compliance.

PHFE recently completed reviewing 403b proposals as part of our due diligence process. This ensures that we are providing our employees with the best retirement plan available. We reviewed

and listened to many presentations by multiple providers to reach the best solution for the organization and our employees.

This was the year that our payroll department went green by making pay cards available for our employees. This gives employees another avenue to receive their pay. This is especially helpful for employees without bank accounts who do not want to carry large amounts of cash on their person.

In compliance with California's AB1825 bill, we offered our bi-annual sexual harassment training for supervisors in the fall this fiscal year. We were able to train over 250 supervisors using a web-based interactive training tool. This allowed us to reach supervisors located in remote offices.

It has been another busy year for the human resources department at PHFE. We'll take a deep breath and start the race all over again. We can't wait to see what this next year will bring.

- Danielle Gonzalez, Director of HR

Practitioner's Point Consulting Services Update

Over the course of the past year, PHFE Consulting Services has continued our practice of providing top-flight consultancies to public health agencies and programs at the local, state and national level. Our work with The US Department of Homeland Security, the State of California, the County of Los Angeles, and the City of Philadelphia is illustrative of PHFE Consulting's ability to work on projects that provide needed services and are designed in a way to deliver necessary results.

As I mentioned last month, PHFE prides itself on providing its direct consulting services through qualified and experienced public health, homeland security and informatics experts and has a very successful track record of providing these services to all in the realm of public health. Our methodology for successfully completing projects with our partners has been refined over time, and today PHFE is better positioned for successfully achieving these objectives than ever before.

PHFE Consulting Services prides itself on listening to the needs of our clients and partners throughout the engagement. The best consultants are those that understand the nuances that are different in the details of each project and who resist the inclination to treat what may be a similar problem the same as you did the last time you encountered it. With that listening, there is a much better chance of achieving the kinds of success that both PHFE and its partners are looking for.

One key to that success is to treat every situation, project, and client as a learning opportunity. There are lessons learned, both good ones and bad ones around every corner. By taking the time to internalize these lessons, PHFE Consulting Services becomes better prepared and informed and is in a better position to provide the services to our clients that result in success and positive outcomes.

-Greg Smith, Director of Consulting Services

Tech Café The Art, Science and Practice of an IT Team

In real life situations, successful team work rarely happens by itself without focused team building efforts and activities. Looking back this year, the PHFE IT department accomplished the following 10 key projects:

1. Built a state-of-the-art Enterprise Data Center in HQ from ground up and right-sized a collocation site
2. Upgraded to the latest Deltek ERP suite (CostPoint 6.2, Time and Expense Self-Service 8.2 and Deltek Performance Management Reporting system)
3. Implemented a new Avaya IP Office phone system
4. Implemented Cybex Biometrics Access Control for the HQ office
5. Launched Citrix GoTo Meeting/GoToWebinar Corporate for remote meeting and training
6. Performed capacity planning for 3-year infrastructure requirements
7. Created several IT policies requested by the Executive Team
8. Hired a Web developer to support key web application projects
9. Initiated a company-wide replacement roll-out for standardized laptops, desktops, and enterprise servers which will recur

every 3-years

10. Collaborated with Consulting services to launch an updated and enhanced PHFE Corporate website.

The IT team is comprised of different personalities, technical expertise, and levels of motivation. But we succeeded this year because of one fundamental constant: we genuinely like each other. This year, we worked hard, learned from challenges, laughed at our weaknesses and spent several lunches brainstorming on IT best practices, innovation and continuous improvements. One must realize that even if the team goals are clear and accepted by everyone in a team setting, there may be no commitment to the group goals or consensus on the means of achieving those goals. Individuals in the team may follow their personal opinions and move in conflicting directions. Additionally, there may be a lack of trust and openness that can block critical communication and lead to loss of coordination of the individual efforts.

But ours is a team that is cohesive, responsible and accountable. As the IT leader, I couldn't be more proud of these accomplishments and can confidently say that we have won big time!

-Jude Lauren, Director of IS and Technology