

## **CBO CBA Assessment Email Reminders**

### **1. CBO CBA Assessment Tool is available for you to complete: Notification to PO & PC**

Day 1: Dear CBO (name):

We are in the process of conducting an assessment to determine your CBA needs and to develop a CBA Strategic Plan to address those needs during the five years of your HIP program. We will like you to complete the CBO CBA Assessment Tool for your organization and/or Partnership, and submit it through the Capacity Request Information System (CRIS). The CBO CBA Assessment Tool needs to be completed in its entirety and submitted by (date). If you have questions or concerns please call you PO (name).  
Thanks for your cooperation.

### **2. CBO CBA Assessment Tool Submitted (YES): Notification to CBO and PO (2a); Notification to PC and PO (2b)**

Dear CBO (name):

2a. Thanks for submitting the completed CBO CBA Assessment Tool. The completed Tool will be reviewed by a CBA Provider and a Post Assessment Contact will be scheduled with you and your staff to discuss and confirm your CBA needs; and, to develop a CBA Strategic Plan (CBASP) to address those needs.

Thanks for your cooperation.

Dear CBA Provider, (name of organization)

2b. We appreciate you working with us to assess and provide CBA to CBOs funded to provide HIP services and interventions. The first step in the assessment process is the completion of the CBO CBA Assessment Tool which has been submitted by (CBO Name) and is ready for your review. You must complete your review of the CBO CBA Assessment Tool by (date)

**3. CBO CBA Assessment Tool not submitted (NO): Reminder to CBO cc PO (cc PO and PO TL on day 11).**

Day 6: Dear CBO (Name):

This is a reminder that your completed CBO CBA Assessment Tool is due on (Date). If you have questions or concerns please call you PO (name). Thanks for your cooperation.

Day 11:

Dear CBO (Name) your CBO CBA Assessment Tool due on (date) has not been received and needs to be submitted immediately. Please call your PO if you have questions or concerns. Thanks for your cooperation.

**4. CBO CBA Assessment Tool Reviewed by CBA Provider and Phone Contact Assessment Scheduled (YES): Notification to CBA Provider, cc PC.**

Dear CBA Provider (name):

Thanks for reviewing the CBO CBA Assessment Tool. The next step is to schedule a Post Assessment Contact which should be documented in CRIS by (Date).

**5. CBO CBA Assessment Tool not Reviewed by CBA Provider (NO): Reminder to CBA Provider, cc PC (cc PC & PC TL on day 11)**

Day 6:

Dear CBA Provider (name):

This is a reminder that the CBO CBA Assessment Tool has not been reviewed. Please review the CBO CBA Assessment Tool which should be documented in CRIS by (date).

Thanks for your cooperation.

Day 11:

Dear CBA Provider (name)

This is a reminder that the CBO CBA Assessment Tool needs to be reviewed immediately for (CBO Name) which should be documented in CRIS. If you have questions or concerns please feel free to contact your Program Consultant or provide comments in the appropriate space within CRIS.

**6. Post Assessment Contact is scheduled with the CBO: Notification to the CBA Provider, cc CBO, PO, & PC**

Dear CBA Provider (name):

Thanks for scheduling a Post Assessment Contact with (CBO name) on (date). Please be sure to document any changes within CRIS and add comments in the appropriate space as needed. Thanks for your cooperation.

**7. Post Assessment Contact is not scheduled with the CBO (NO): Notification to CBA Provider, cc PC on day 3 (cc PC & PC TL on day 6)**

Day 3:  
Dear CBA Provider (name)

This is a reminder that the Post Assessment Contact with (CBO name) needs to be scheduled and documented in CRIS. If you have questions or concerns please feel free to contact your Program Consultant or provide comments in the appropriate space within CRIS. Thank you for attending to this matter.

Day 6:  
Dear CBA Provider (name):

This is a reminder that the phone contact assessment with (CBO name) needs to be scheduled immediately and documented in CRIS. If you have questions or concerns please feel free to contact your Program Consultant or provide comments in the appropriate space within CRIS. Thanks for attending to this matter as soon as possible.

**8. Post Assessment Contact is rescheduled with the CBO: Notification to CBA Provider, cc CBO, PO, & PC**

Dear CBA Provider (name):

Thanks for working with (CBO name) to schedule a Post Assessment Contact. The Post Assessment Contact has been rescheduled for (date). Should you have questions or concerns please feel free to contact your Program Consultant and provide comments in the appropriate space within CRIS.