



## Request for Proposal

### Credible Messengers

**Program # 682**

Direct all replies to:

Krista Kennedy  
Contract Compliance Monitor  
1717 Taylor Avenue  
Racine WI 53403  
262.638.6671

**SEALED PROPOSALS MUST BE RECEIVED NO LATER THAN:**

Tuesday, November 27, 2018 at 12 pm - Noon

At the Racine County Human Services Department

1717 Taylor Avenue – Three North Receptionist

Racine WI 53403

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## Racine County Human Services

### Request for Proposal: Credible Messengers Program #682

#### Section I. Specifications

##### 1. Introduction:

The ability of youth to engage in and connect with community supports that help to build social capital and support economic and social-emotional stability is minimized if those presenting the message are not credible. Credibility lies in the ability to create a relationship based on similarities, an understanding of where youth come from, an understanding of involvement with the justice system that youth can appreciate and the ability of the messenger to communicate with the youth. The Credible Messenger program partners with the youth, families and the case manager to serve as a guide, mediator and mentor, and assist youth in becoming capable of functioning within the community without further involvement in the justice system, support the youth's well-being, help youth to change or break generational cycles and alter challenging life circumstances.

This program is based on the *Arches Credible Messenger Program* in New York City. New York has eliminated its youth prison population by bringing services to the youth and their families into the neighborhoods. They recruited and hired staff living in these neighborhoods who have credibility within the neighborhoods, an understanding or past involvement with either the juvenile justice or criminal justice systems and can partner with the youth and their families to promote change and accountability.

This is a curriculum-based group and individual mentoring intervention that assists justice-involved youth transform the attitudes and behaviors that have led to criminal activity. The program goes beyond the traditional mentoring approach. Credible Messengers work with youth in both group sessions and individually to promote positive behaviors. This is achieved by mentoring youth who are involved in the juvenile system, ensuring youth have the resources and support to make the positive changes needed to avoid further interaction with the youth justice system. The objective is not to just prevent subsequent criminal behavior but to build skills in youth so they can be successful in school and work and develop the core competencies needed to be successful within the community.

RCHSD and the Provider will locate and recruit Messengers through contacts with community centers, churches, local activists, COP Houses and others within the targeted neighborhoods. Reliance on these entities within the community to assist in identifying individuals who are credible and have a positive skill set, is imperative to the success of this program. Services would be delivered in the community setting where the highest level of need is evident. This may include the school, at home or in a community center or church. Continuing to partner with these entities for space and localized services and support increases the likelihood of success for the youth in this program. Additionally, Messengers and youth will partner with the youth's assigned school, youth justice case manager, family and other support systems. All entities will regularly give input on the progress and successes noted with each youth and will create a formal support system for success.

The focus of this effort is on the achievement of developmental outcomes such as the ability to seek help in a crisis, get along with others, show up on time, etc. that can prepare a person for education, employment and civic participation. Our Credible Messenger Program will utilize the evidence-based curricula, ***“Thinking for a Change”***, developed by the US Department of Justice, National Institute for Corrections; and ***“Interactive Journaling”***, an evidence-based program that uses journaling to assess a youth’s readiness to change and provides strategies that lead an individual successfully through the process of change, action and maintenance of prosocial behavior.

Youth often find themselves in less than stable situations which can divert attention from day-to-day functioning and reduce their ability to participate in programming. To address this issue, wrap around funds will be made available to assist in stabilizing their home environments to reduce stress and direct attention back to programming. These funds can also assist in the payment of fees for extra-curricular activities, enrichment programs, sports and family enrichment activities. “Breaking bread” is an essential function of the program and promotes youth engagement. Food will be provided for group sessions and transportation will be arranged for all youth. Rewards will be provided to youth who successfully complete milestones within the program and upon successful completion of the program.

The evidence-based, structured and experiential writing approach, “Interactive Journaling”<sup>®</sup>, goes beyond standard educational materials and resources to make the individuals the center of their own change process. This approach helps participants understand that change is possible and they are responsible for making it happen; reinforces and sustains what is provided in program settings and the commitment to the process of self-change; gives the youth the opportunity to tell their own story in their own words; keeps youth engaged, motivated and organized in their change efforts; provides a permanent resource; moves participants from being information gatherers to owners of the change process; gives practical techniques to move participants along the stages and processes of change; engages participants in the creation of a tool for healthy living. Modules include: *My Substance Use, My Feelings, My Family, Relationships and Communication Skills, How We Think, How We Change, Building Strong Values, Moving Forward*, etc.

With the combination of real world mentors and strong curriculum, youth will gain a sense of themselves, sense of community, responsibility, decision making, long-term planning, educational and work goals, self-sufficiency, etc. Connecting youth to resources, positive activities and a support system where they live will promote positive change and accountability. It is expected that all youth involved in the Credible Messenger program will receive 8 contacts per month. Youth will not be discharged from the program for non-compliance or sporadic non-compliance.

## **2. Qualifications:**

- 2.1** The applicant must be an established and licensed business (ex: LLC, 501(c)3, etc.) and registered to work in the state of Wisconsin. Preference will be given to non-profit, Racine Community based organizations and is an evaluation category.

- 2.2** For this program to be successful, staff must be reflective of the community served. Messengers would include a mix of people who have been justice-involved, who work in the private and nonprofit sectors and are respected residents of the community. Qualifications and skills required for Messengers include:
- 2.2.1** Culturally appropriate
  - 2.2.2** Responsive to the needs of minority individuals
  - 2.2.3** Knowledge or experience with the justice system
  - 2.2.4** An understanding of and credible presence within the targeted neighborhood
  - 2.2.5** Experience working with youth and families
  - 2.2.6** Demonstrated capacity to establish trusting relationships
  - 2.2.7** Ability to accept individual differences
  - 2.2.8** Experience and willingness to work with culturally diverse populations
  - 2.2.9** Familiarity with the unique challenges faced by youth who live in the identified neighborhoods
  - 2.2.10** Ability to promote positive attitudes and philosophies
  - 2.2.11** Knowledge of community services
  - 2.2.12** Ability to reduce youth isolation by connecting youth to informal and formal support systems and resources
  - 2.2.13** Ability to assist youth in recognizing and developing their own strengths
  - 2.2.14** Ability to assist parents/guardians in developing their advocacy skills and demonstrate their own transformation and ongoing integrity

**3. Program Requirements:**

- 3.1** It is expected approximately 70 to 75 youth annually can be served through this program.
- 3.2** Credible Messengers will be available to the youth primarily in later afternoons, early evenings and weekends and on an as needed basis to support youth who are in crisis situations or who simply need to talk with their Messenger.
- 3.3** The program will work to stabilize youth functioning by increasing the number of formal and informal supports and mitigating barriers to services. Services provided include:
  - 3.3.1** Assessment and goal setting with the youth as the focus.
  - 3.3.2** Referrals to community service agencies as needed
  - 3.3.3** Advocacy and/or mediation services
  - 3.3.4** Weekly check-ins to monitor youth progress in accessing both formal and informal supports and services
  - 3.3.5** Group meetings held in neighborhoods to encourage development of informal/peer support
  - 3.3.6** Youth enrichment activities, both individual and group
- 3.4** This program is designed with the assumption that some youth may continue to display negative attitudes and behaviors during the program period.
  - 3.4.1** There will be no expulsion or rejection of youth who might continue to engage in negative behavior during their participation.

- 3.4.2** The premise of this program is not attendance and compliance with a rule structure.
- 3.4.3** In the event a youth doesn't attend planned meetings or groups; the Messenger will seek the youth partner out in the community and continue to engage him/her in the program.
- 3.4.4** Patience and understanding are required, as are clear expectations.
- 3.5** The objective is not to just prevent subsequent criminal behavior but to build skills in youth so they can be successful in school and work and develop the core competencies needed to be successful within the community. This is accomplished by utilizing a mentoring intervention that includes:
  - 3.5.1** A group process where participants become an important support system for each other.
  - 3.5.2** A curriculum based on cognitive behavioral principles delivered by culturally appropriate mentors.
  - 3.5.3** 24/7 on-call availability for support, advice and guidance.
  - 3.5.4** Incorporation of positive youth development values, principles and practices.
  - 3.5.5** Case management services provided by the RCHSD Youth Justice staff.

#### **4. Target Population(s)**

Youth residing in specific geographical areas within Racine County that are serviced by the Racine Unified School District (RUSD) and concomitantly involved in the Youth Justice System. Youth who are eligible to participate in this program will meet the following criteria:

- 4.1** Have been adjudicated delinquent and are currently on Juvenile Court orders
- 4.2** Live within the boundaries of the Racine Unified School District.
- 4.3** Have a Youth Assessment Screening Instrument (YASI) score of medium or high.
- 4.4** Chronically involved in the justice system, including CHIPs crossover youth.
- 4.5** Youth disconnected from positive supports and are not amenable to traditional social service systems.
- 4.6** Youth who are resistant to change.
- 4.7** Youth who are gang-involved.
- 4.8** Youth returning to the community from State Corrections or the Racine County Alternatives to Corrections through Education Program may be given priority.

#### **5. Program Goals and Objectives:**

The program will work to stabilize youth functioning by increasing the number of formal and informal supports and mitigating barriers to services. The focus of this effort is on the achievement of developmental outcomes such as the ability to seek help in a crisis, get along with others, show up on time, etc. that can prepare a person for education, employment and civic participation.

The goals of this project are:

- 5.1** Provide meaningful mentoring that promotes positive social-emotional well-being
- 5.2** Promote academic achievement, personal development and wellness, cultural enrichment, and career development
- 5.3** Increase positive youth personal skills
- 5.4** Provide youth the needed tools to remain free of the youth justice and criminal justice systems.

Outcomes for this project include:

- 5.5** Reduction in high risk behaviors;
- 5.6** Obtainment or maintenance of any needed services;
- 5.7** Strengthened protective/resiliency factors;
- 5.8** Development of sustainable life skills;
- 5.9** Development of skills and behaviors that lead to positive/healthier lifestyle choices;
- 5.10** Reduction in recidivism, especially for felonies and violent crimes;
- 5.11** Reduction in time in secure detention;
- 5.12** Reduction of out-of-home placement rates;
- 5.13** Improvement in pro-social attitudes;
- 5.14** Improvement in family engagement;
- 5.15** Stronger community connections;
- 5.16** Better engagement in school and work;
- 5.17** Increased hope among participants;
- 5.18** Reduction of penetration into the adult criminal justice system

## **6. Program Reporting:**

The Provider will be required to track data and submit statistical reports by the 15<sup>th</sup> of each subsequent month and within 2 business days as requested by Racine County. A template for tracking and reporting will be provided.

- 6.1** Client demographics to include age, gender, race, ethnicity, marital status, household income, zip code, etc.
- 6.2** All performance markers outlined in the Evaluation Outcomes below in Section 7.

## **7. Evaluation Outcomes:**

- 7.1** 90% of youth will show a reduction in high risk behaviors; development of skills and behaviors that lead to positive/healthier lifestyle choices; improvement in pro-social attitudes; improved family engagement; as demonstrated by YASI and CAFAS scores.
- 7.2** 90% of youth will obtain and maintain needed services.
- 7.3** 85% of youth will not be adjudicated delinquent or have additional adult court contact for a year after discharge.
- 7.4** 85% of youth will not be placed in secure detention for sanctions during their involvement with the program.

- 7.5 85% of youth will maintain regular attendance and participation in their educational and/or work programs.
- 7.6 90% of youth will attend all group and mentoring sessions.

## **8. Project Positions:**

There are three (3) positions as part of the project scope briefly described below. Full job descriptions can be found as attachments at the conclusion of this RFP.

- 8.1 **Project Coordination / Lead Transformative Mentor:** This full time position is responsible for the management and administration of the program, leading the team and supervision of the messengers and family engagement specialist; positive and regular communication with RCHSD, tracking and management of data and coordination with training and technical assistance.
- 8.2 **Family Engagement Specialist:** Provides individual support to the family members of youth involved in the Credible Messenger program; facilitates support groups; participates in community building and social opportunities. Partners with youths assigned Credible Messenger to ensure messaging to the youth's family is consistent. Provide advocacy services to the family. This position should be half-time at minimum, but full time is preferred.
- 8.3 **Credible Messengers:** Provide one-on-one support and advocacy for youth and participate in groups, trainings and community building opportunities. Additionally, they will co-facilitate groups when necessary, provide feedback to Youth Justice case manager, school personnel or others determined to be integral to the youth's development and success. Credible Messengers are individuals whom have faced similar challenges as our youth and/or families and have overcome it and now are inspired to work and lend guidance to those that are in a similar need as they once were. The work of the Credible Messengers provides a message of resiliency, credibility and voice that can directly connect to each youth's inner thoughts and experiences. The five (5) part time Credible Messengers should be compensated between \$14-17 hourly.

## **9. Contract Period:**

Contract will commence upon acceptance of the terms described and execution of the contract by both parties, with a target start date of December 5, 2018. The initial contract period shall continue through 2019. Thereafter, it may renew for one additional year at Purchaser's discretion based on Provider performance and funding available.

## **10. Contract:**

The contract for this project will consist of this Request for Proposals document, the specification documents and any associated exhibits or documents, the proposer's response with all required forms, addenda, any negotiated terms and conditions and a standard Racine County contract.



**11. Cost:**

Cost listed by proposer must be complete and inclusive of all charges at the time of submission. Proposer certifies that prices, terms and conditions in the proposal will be firm for acceptance for a period of ninety (90) days from the date of opening unless otherwise stated by Racine County. Proposal may not be withdrawn before the expiration of ninety (90) days. Prices shall be firm with no escalator clauses unless specified by Racine County. Proposals may be withdrawn after ninety (90) days only upon written notification to Racine County.

**12. Calendar of Events:**

This calendar is subject to change at the sole discretion of Racine County. All attempts will be made to adhere to this calendar however circumstances may require modification of dates and/or times.

<b>Event</b>	<b>Date</b>
RFP issued, posted on website and newspaper	11/7/18
Written questions/requests for clarification due to Racine County	11/14/18 by 4 pm. <b>Questions submitted later will not be considered.</b>
Racine County written responses to questions/clarifications posted on website	11/16/18
Proposals due at Racine County, and dropped off at the Three North Receptionist	11/27/18 by 12 pm (noon). <b>Late proposals will not be accepted</b>
Public Opening of Sealed Proposals	11/27/18 at 3 pm Three North Conference Room
Proposal Evaluations Completed by...	11/30/18
Face-to-Face interviews scheduled, if needed	12/3/18
Contract Awarded	12/4/18
Contract Start Date	Anticipated to start 12/5/18

**13. Right of Rejection:**

Racine County, through its duly authorized agents, reserves the right to reject any or all proposals, any portion of a proposal, waive all technicalities, and to accept the proposal considered most advantageous to Racine County following final negotiations, evaluations and reviews. Racine County does not warrant or guarantee that a contract will be awarded as a result of this Request for Proposals.

**14. Instructions to Proposers:**

- 14.1** Thoroughly examine the scope of work, schedule, instructions and all other Solicitation documents and make all investigations necessary to be familiar with conditions that affect the proposal. No pleas of ignorance by the proposer as a result of failure to investigate or examine conditions or failure to fulfill details of the contractual documents will be accepted as a basis for varying the requirements of the County or changing the compensation due.
- 14.2** Racine County contracts are subject to all legal requirements of Racine County, State of Wisconsin or Federal statutes and regulations, as applicable. Laws of the State of Wisconsin apply.
- 14.3** Provide all required information on the forms furnished in this document. Print or type your name and that of your agency on the Proposal Cover Sheet. **Do not include your name or the name of your agency in the body of the proposal and budget page (Appendices D-E, G)! Proposals may be disqualified.** If you obtained this solicitation electronically, you may complete your responses on the electronic forms however a hardcopy of the proposal must be submitted with your signature on the Proposal Cover Sheet. Do not alter the solicitation documents when completing the forms. Submission of the proposal affirms that you did not alter the original documents beyond filling in the required information.
- 14.4** Note that there are two separate packets of documents to complete. One will contain a complete original (Appendices A-F) plus five (5) copies of your proposal criteria (Appendices D-F) and the other your original budget page (Appendix G) plus five (5) copies. All proposals shall be one sided and may be paper clipped, do not staple any pages. When submitting your hardcopy proposals, seal each packet in a separate envelope.
- 14.5** All proposals must be current and final at the time of opening to be considered responsive. No proposal will be accepted for consideration, and no award will be made if, at the time of opening, anything contained therein is contingent upon or subject to any outstanding review, certification or approval by any party that has not been received.
- 14.6** The following chart illustrates the required proposal documents and specifies the minimum content of the proposal sections. Proposals should be organized in tabbed sections following this chart and each point listed below should be addressed in your proposal.

Appendix	Title	Contents
A	Proposal Cover Sheet	Complete this form for each packet of the proposal...the program and the budget documents.
B	Vendor Acceptance Form	Complete this form and attach it to the original proposal.
C	Reference Document and letters of support	On the form included in this packet, list three (3) references who are familiar with your work and your ability to fulfill the requirements of this proposal. <b>A letter of support from each referenced party must be attached.</b> Racine County may also consider reference responses from agencies or individuals not listed in your proposal. <u>All information provided must be current and correct. Racine County will not attempt to search for current information that is not provided.</u>
D	Agency Overview	DO NOT LIST YOUR NAME OR THAT OF YOUR AGENCY IN THE NARRATIVE OR CRITERIA SECTIONS. Describe your agency and how your mission relates to the need listed in the RFP. <b>Include only one copy of your business license with the original, this will not be included in the information the evaluation committee reviews to protect the blind process.</b>
E	Proposal Criteria	Provide detailed information in response to each specific criterion listed. Complete the timeline table (E1) as an attachment to this document.
F	Past Performance	Provide any past experience you have with Racine County.
		<b>In a separate sealed envelope:</b>
G	Budget Worksheets	Complete the anticipated expenses on G1 and budget spreadsheet G2. You may include a budget narrative to provide a more detailed understanding of the costs for which Racine County will be billed. Evidence of agency's profitability/sustainability must be attached.

**15. Submission of Proposals:**

Submit one original master copy (so marked) and five photocopies (so marked) of your proposal. On the front of the envelope containing your proposal and copies, indicate the following:

Name & Address of Bidder  
Due Date of Bid  
Proposal Number & Title

All proposals must be manually signed by an authorized official of the agency.

Telegraphic, fax, email and on-line responses WILL NOT BE ACCEPTED. The original, signed proposal must be delivered to the address indicated below:

Krista Kennedy  
Contract Compliance Monitor  
Racine County Human Services Department  
1717 Taylor Avenue  
Racine WI 53403  
Krista.kennedy@racinecounty.com

Proposals can also be dropped off at the THREE NORTH Receptionist at the Racine County Human Services Department between 9 am and 4 pm Monday through Friday. **Late proposals will not be accepted and will be returned unopened.**

**16. Contact Person:**

- 14.1** The Racine County Human Services Contract and Compliance Monitor will act as the County representative in the issuance and administration of this RFP and contract, and shall issue and receive all documents, notices and correspondence pertaining to this RFP. Such documents, notices, and correspondence not issued by or received by the Contract Compliance Monitor shall be null and void.
- 14.2** Questions related to this Request for Proposal shall be delivered in writing (email, postal delivery or hand delivered) to the Contract Compliance Monitor. **Final date for questions is listed in the Calendar of Events.** No questions will be accepted over the phone and no other Racine County representative is authorized to interpret any portion of this RFP.
- 14.3** All questions received by the Contract and Compliance Monitor will be researched and responded to on the date listed in the Calendar of Events and posted on the Racine County Human Services website which can be accessed by the following link:

<http://racinecounty.com/government/human-services>

Contracts and Budget – Contract Proposal - 2018 – Competitive Bid Specs

No verbal or written information, which is obtained other than through this Request for Proposals or its addenda, shall be binding upon Racine County. Proposers are expected to raise any questions, exceptions or additions they have concerning this document as soon as possible during the RFP process.

**17. Confidentiality/Non-Disclosure:**

- 17.1** It is the intent of the County that all proposals received will remain sealed and confidential until reviewed by the Proposal Evaluating Committee.
- 17.2** Once the process is complete, no information submitted as part of this RFP process shall be considered proprietary or confidential.
- 17.3** By submitting a proposal, vendors acknowledge that the County may be required under the law to make its records available for public inspection at any time during this RFP process. All vendors acknowledge and agree that the County will have no obligation or any liability to the vendor if the County must disclose these materials.

**18. Errors or Omissions:**

- 18.1** If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this bid, the vendor should immediately notify the above-named individual of such error and request modification or clarification of the RFP document.
- 18.2** Racine County reserves the right to permit cure of, or waive as an informality, any irregularities or technicalities contained in any proposal submitted, at the sole discretion of Racine County provided such waiver does not substantially change the offer or provide a competitive advantage to any other vendor. Contracts will be awarded in the best interests of Racine County.

**19. Addenda:**

Changes to this RFP will be made only by formal, written addendum issued by Racine County's Contract Compliance Monitor and posted on the Racine County Human Services Website. All addenda issued as part of this RFP shall become part of the specifications of this RFP and will be made part of the contract. It is the vendor's responsibility to check and assure receipt of all addenda.

**20. RFP Evaluation Process:**

- 17.1** Racine County will receive proposals from interested vendors having relevant experience, resources and qualifications in the proposed scope of work. Proposals for this project must contain evidence of the vendor's experience and abilities in the applicable field.

- 17.2** All proposals received will be evaluated by a selection team that consists of Racine County representatives. The team will review and evaluate all detailed proposals submitted and may conduct in-person interviews with proposers if deemed necessary. The selection team will have only the response to this solicitation to review for selection of a finalist. It is therefore important that proposers emphasize specific information considered pertinent to the services provided. Racine County reserves the right to request clarification of any portion of any submittal.
- 17.3** Racine County will be under no requirement to complete the evaluation by any specific date and reserves the right to suspend or postpone the evaluation process should the need arise due to budget constraints, time constraints or other factors as directed by the County. It is anticipated, however, that the review/evaluation process will be completed in a timely manner.
- 17.4** A Proposal Evaluation Committee will be established to review and evaluate all proposals submitted in response to this RFP. The Contract Compliance Monitor will be a non-voting member and, as such, will prepare the proposals for the committee so that no vendor identifying information will be available to the evaluators. The Committee will conduct a preliminary evaluation of all proposals based upon the information provided and other evaluation criteria as set forth in this RFP. The contract will be awarded to the most qualified contractor per the evaluation criteria listed below.

<b>EVALUATION CRITERIA</b>	<b>WEIGHT</b>
Agency's Qualifications and Experience	20%
Proposal Criteria	30%
Community Partners and Letters of Support	20%
Non-Profit, Racine Community Based Organization	20%
Proposed Budget Plan and Agency Fiscal Literacy	10%
Total	100%

<p>Past Performance</p> <ul style="list-style-type: none"><li>• There is no weight for this category. It allows vendors with a past experience with Racine County the opportunity to be recognized for their contributions.</li><li>• For those vendors with no prior experience, this category will not be calculated in their scoring and therefore will not impact their overall rating in any way.</li><li>• To maintain the blind process, this section represents scores obtained from other officials within Racine County who are not part of the evaluation committee. They will be selected for having a direct experience with all the agencies who submitted proposals. Supporting evidence will be attached to the final scoring sheet.</li></ul>	<p>15 points maximum</p>
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**17.5** Refer to the accompanying “Agency Overview” and “Program Criteria” document (Appendices D and E) for specific information to include in your proposal.

**21. Interviews:**

If requested, proposers may be required to participate in an interview at the site of the proposed program or in the offices of the Racine County Human Services Department. Proposers should be prepared to discuss and substantiate any of the areas of the proposal submitted, as well as its qualifications to furnish the specified program. The interviews will be scored by the Evaluation Committee.

**22. RFP Preparation Expense**

Racine County shall not be liable for any expense incurred in replying to any request for proposal or invitation to bid.

**23. County RFP Notice of Rights:**

Racine County reserves the following rights to:

- 23.1** Conduct pre-award discussion and/or pre-award/contract negotiations with any or all responsive and responsible proposers who submit proposals determined to be reasonably acceptable of being selected for award; conduct personal interviews or require presentations of any or all proposers prior to selection; and make investigations of the qualifications of proposers as it deems appropriate, including but not limited to a background investigation conducted by the County or its agents.
- 23.2** Request that proposer(s) modify its proposal to more fully meet the needs of the County or to furnish additional information as the County may reasonably require.

- 23.3** Accord fair and equal treatment with respect to any opportunity for discussions and revisions of proposals. Such revisions may be permitted after submission of proposals and prior to award.
- 23.4** Process the selection of the successful proposer without further discussion.
- 23.5** Request Best and Final Offers from any or all proposers at the sole discretion of the County.

**24. Indemnity and Insurance Requirements:**

- 24.1** Upon execution of a contract, contractor agrees to indemnify, hold harmless and defend Racine County, its officers, agents and employees from all liability including claims, demands, losses, costs, damages and expenses of every kind and description or damage to persons or property arising out of or in connection with or occurring during the course of this agreement where such liability is founded upon or occurring out of the acts or omissions of the contractor, its agents or employees.
- 24.2** Contractor agrees to protect itself and Racine County under the Indemnity Agreement set forth in the above paragraph. Contractor will at all times during the term of this contract keep in force and effect commercial general liability, professional liability, automobile liability, worker's compensation insurance policies issued by a company or companies rated A-VII or better by AM Best and authorized to do business in the State of Wisconsin with the following limits of coverage:
  - 24.2.1** General Liability
    - 24.2.1.1 \$1,000,000 each occurrence
    - 24.2.1.2 \$1,000,000 personal and advertising injury
    - 24.2.1.3 \$1,000,000 general aggregate
    - 24.2.1.4 \$1,000,000 products and completed operations
    - 24.2.1.5 There shall be no exclusion for abuse or molestation
  - 24.2.2** Auto Liability Insurance
    - 24.2.2.1 \$1,000,000 Combined Single Limit
  - 24.2.3** Umbrella Liability Insurance on a following form basis
    - 24.2.3.1 \$4,000,000 each occurrence
    - 24.2.3.2 \$4,000,000 aggregate
    - 24.2.3.3 Any combination of underlying coverage and umbrella equaling \$5,000,000 shall be acceptable
    - 24.2.3.4 There shall be no exclusion for abuse or molestation
  - 24.2.4** Workers Compensation Statutory Limits plus:
    - 24.2.4.1 \$100,000 E.L. Each Accident
    - 24.2.4.2 \$100,000 E.L. Disease Each Employee
    - 24.2.4.3 \$500,000 E.L. Disease Policy Limit



**24.3 The inability to meet the insurance limits outlined above will not automatically disqualify the proposal.** Purchaser, acting at its sole option, may waive any and all insurance requirements. Waiver is not effective unless in writing. Such waiver may include or be limited to a reduction in the amount of coverage required above. The extent of waiver shall be determined solely by Purchaser's risk manager taking into account the nature of the work and other factors relevant to Purchaser's exposure.

**24.4** Upon execution of a contract and at any other time if requested by Racine County, contractor shall furnish Racine County with written verification of the existence of such insurance.

**25. Background Checks:**

Upon execution of a contract, contractor will conduct criminal and caregiver background checks through the State of Wisconsin on all employees who provide services in this program. No employee may have contact with any youth, parent or caregiver in the program without an acceptable caregiver background check. Documentation of these background checks must be maintained and submitted to Racine County Youth and Family Division Management for review prior to employee beginning project. For existing agency staff, background checks must be current within 90 days.

**26. Audit Requirements:**

Unless waived by Racine County, contractors must submit an annual audit to Racine County if the total amount of annual funding provided by Racine County (from any and all of its Divisions taken collectively) for all contracts is \$100,000 or more.

**27. Racine County Standard Terms and Conditions:**

Proposer must agree to comply with the following terms and conditions:

- 27.1** Standard contract language
- 27.2** Certification standards where applicable
- 27.3** Fiscal and program reporting criteria
- 27.4** Allowable Cost Policy
- 27.5** Audit criteria
- 27.6** Policies and procedures as defined in Racine County Human Services Department Contract Administration Manual
- 27.7** Maintain adequate liability coverage
- 27.8** Civil Rights/Affirmative Action Policies
- 27.9** Fair Labor Standards Act
- 27.10** Criminal and caregiver background checks, drug screening, driver's license checks for all staff working within the project scope.
- 27.11** Recognize that authorization for services is approved by Racine County Human Services Department.

**27.12** All informational materials (program descriptions, brochures, posters, etc.) must identify it as a Racine County Human Services Department (RCHSD) program through the use of a standardized Racine County Human Services format provided by Racine County.

**27.13** The program must be identified as a RCHSD program in all public presentations and media contacts/interviews.

**END OF PROPOSAL INSTRUCTIONS—  
PROCEED TO APPENDICES TO COMPLETE  
THE PROPOSAL**

## **PROJECT COORDINATOR/LEAD TRANSFORMATIVE MENTOR JOB DESCRIPTION**

### **Basic Function**

Responsible for the management and administration of the program, leading the team and supervision of the messengers and family engagement specialist; positive and regular communication with RCHSD, tracking and management of data and coordination with training and technical assistance.

### **Essential Duties**

1. Provide oversight and management of the program.
2. Provide supervision and oversight of the Credible Messengers and Family Engagement Specialist.
3. Receive referrals from RCHSD and assign youth to Credible Messenger.
4. Ensure a YASI and CAFAS screen is completed within 30 days of enrollment in the program and within 30 days following discharge.
5. Provide consultation to referring staff.
6. Facilitate group activities, community building opportunities, social opportunities for the program.
7. Advocate for youth.
8. Maintain records.
9. Recommend policies and create procedures.
10. Maintain current and accurate statistics, tracking and management of data.
11. Coordinate training for all staff.
12. Ensure fidelity to the model programs utilized in this program.
13. Attend regular meetings with and provide updates to the Youth Justice Supervisor.

### **Supervision Received**

Receives supervision from a Youth Justice Supervisor.

### **Supervision Exercised**

Supervises the Credible Messengers and Family Engagement Specialist.

### **Qualifications**

- Minimum of a high school diploma, GED or HSED, bachelor's degree preferred.
- Relevant experience in the youth development field.
- Strong management abilities.
- Has the maturity, wisdom and integrity to manage Credible Messengers and Family Engagement Specialist.
- Valid Wisconsin driver's license, if providing transportation services.
- Prompt and regular attendance

### **Knowledge, Skills and Abilities**

- Working knowledge of the Youth Justice and Adult Justice systems.
- Ability to work frequent evenings and weekends.
- Ability to respond to crisis and to make appropriate judgments as to resolutions.
- Ability to deliver concise oral and written reports.
- Ability to work well with other agencies.
- Knowledge of community resources.
- Experience and/or training in group facilitation.
- Requires prompt and regular attendance on the job.

This description has been prepared to assist in properly evaluation various classes of responsibilities, skills, working conditions etc. present in the classification. It is intended to indicate the kind of tasks and characteristic levels of work difficulty that will be required of positions that will be given this title. It is not intended as a complete list of specific duties and responsibilities, nor, is it intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of a similar kind and level of difficulty.

**FAMILY ENGAGEMENT SPECIALIST - JOB DESCRIPTION****Basic Function**

Provides individual support to the family members of youth involved in the Credible Messenger program; facilitates support groups; participates in community building and social opportunities. Partners with youths assigned Credible Messenger to ensure messaging to the youth's family is consistent. Provide advocacy services to the family.

**Duties and Responsibilities**

1. Provide one-on-one support and advocacy services to assigned families. Families will be seen at least once weekly while enrolled in the program.
2. Obtain and assess relevant information regarding client's development, i.e., social, familial, medical and vocational strengths.
3. Provide client with necessary or appropriate information regarding services offered by the Human Services Department or the community.
4. Refer to and coordinate the various services to implement plan.
5. Monitor on-going progression of client/plan to assure the efficiency and adequacy of service system.
6. Recommend to management changes or gaps in the system that prevent the delivery of services
7. Be familiar with the RCHSD case management plan and youth's court order.
8. Maintain and develop resources appropriate to needs of client population served.
9. Prioritize and organize time to cover assigned area and manage caseload in equitable manner.
10. Develop and maintain contacts with in/out of house agencies who may be able to provide services to clients of the agency.
11. Document all case work activities.
12. Provide an evaluation, advocacy and follow-up capability to the clients included in the assigned caseload.

**Duties and Responsibilities**

Receives general supervision from the Project Coordinator/Lead Mentor.

**Qualifications**

1. Minimum of a high school diploma, GED or HSED, bachelor's degree preferred.
2. Should be rooted in the community that they will serve.
3. Demonstrate credibility, integrity and leadership for families.
4. Ability to guide and support families.
5. Ability to deliver concise oral and written reports.
6. Ability to work well with other agencies.
7. Experience and/or training in group facilitation.
8. Requires prompt and regular attendance on the job.

This description has been prepared to assist in properly evaluating various classes of responsibilities, skills, working conditions etc. present in the classification. It is intended to indicate the kind of tasks and characteristic levels of work difficulty that will be required of positions that will be given this title. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of a similar kind and level of difficulty.

## CREDIBLE MESSENGER - JOB DESCRIPTION

### **Basic Function**

To provide one-on-one support and advocacy for youth and participate in groups, trainings and community building opportunities. Additionally, they will co-facilitate groups when necessary, provide feedback to Youth Justice case manager, school personnel or others determined to be integral to the youth's development and success. Credible Messengers are individuals whom have faced similar challenges as our youth and/or families and have overcome it and now are inspired to work and lend guidance to those that are in a similar need as they once were. The work of the Credible Messengers provides a message of resiliency, credibility and voice that can directly connect to each youth's inner thoughts and experiences.

### **Duties and Responsibilities**

1. Provide one-on-one support and advocacy services to assigned youth. Youth will be seen at least two times weekly while enrolled in the program.
2. Obtain and assess relevant information regarding client's development, i.e., social, familial, medical and vocational strengths.
3. Ensure a YASI and CAFAS screen is completed within 30 days of enrollment in the program and within 30 days following discharge.
4. Provide client with necessary or appropriate information regarding services offered by the Human Services Department or the community.
5. Attend group meetings, community building opportunities, social opportunities, etc.
6. Be familiar with the RCHSD case management plan and youth's court order.
7. Refer to and coordinate the various services to implement plan.
8. Recommend to management changes or gaps in the system that prevent the delivery of services
9. Prioritize and organize time to cover assigned area and manage caseload in equitable manner.
10. Maintain and develop resources appropriate to needs of client population served.
11. Develop and maintain contacts with in/out of house agencies who may be able to provide services to clients of the agency.
12. Document all case work activities.
13. Provide evaluation, advocacy and follow-up capability to the clients included in the assigned caseload.

### **Duties and Responsibilities**

Receives general supervision from the Project Coordinator/Lead Mentor.

### **Qualifications**

1. High School Diploma, GED, HSED preferred
2. Should be rooted in the community that they will serve.
3. Demonstrate credibility, integrity and leadership for youth.
4. Ability to guide and support youth.

This description has been prepared to assist in properly evaluating various classes of responsibilities, skills, working conditions etc. present in the classification. It is intended to indicate the kind of tasks and characteristic levels of work difficulty that will be required of positions that will be given this title. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or in any way modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of a similar kind and level of difficulty.

**APPENDIX A**

Proposal Code Letter: \_\_\_\_\_

(for Racine County use only)

# Racine County Human Services

## Request for Proposal Cover Sheet

### Credible Messengers

### Program # 682

Company Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Authorized	Date
Printed Name: _____	Submitted: _____

**NOTE: Complete one Cover Sheet for your proposal and a separate Cover Sheet for your Budget Worksheet.**

Documents Included (initial all you are attaching):

\_\_\_\_\_ Vendor Acceptance Form

\_\_\_\_\_ Reference List

\_\_\_\_\_ Three (3) Letters of Support

\_\_\_\_\_ Agency Overview

\_\_\_\_\_ Business License

\_\_\_\_\_ Proposal Criteria and Timeline

\_\_\_\_\_ Budget Worksheets

\_\_\_\_\_ Agency Financials

APPENDIX B

Vendor Acceptance Form

Program Name: Credible Messengers \_\_\_\_\_

Program #: 682

Date of Issue 11/7/18

By signing and submitting this Proposal, I \_\_\_\_\_ hereby  
(Print Name)

certify and swear that I am a duly authorized agent of this company, I have examined and carefully prepared this proposal from the written specifications and information of Racine County and have checked the same in detail before submitting said proposal to Racine County. I have full authority to make such statements and submit this proposal, and all statements submitted are true and correct.

I FURTHER CERTIFY that no agreement has been entered into to prevent competition for said work. I have carefully examined all materials related to this proposal.

I FURTHER CERTIFY that any data sheets and descriptive literature attached hereto are true and correct and are intended to be made part of this bid/proposal response.

I FURTHER CERTIFY that neither this company nor any of its principals are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal, State, County, Municipal or any other department or agency thereof. I certify that this company/agency will provide immediate written notice to the County if, at any time, it is learned that this certification was erroneous when submitted or has become erroneous by reason of changed circumstance.

I acknowledge that Racine County reserves the right to reject any and all proposals, waive informalities, and to select the vendor considered by Racine County to be most advantageous, at the sole discretion of Racine County.

I agree to and understand that submitting a proposal is not a guarantee of an award of contract. I further understand this program's funding is based on the availability of state, federal and/or county funds. If such funding is reduced or canceled, Racine County has no obligation to continue with proposal reviews nor award a contract.

In compliance with this Request for Proposals and subject to all the terms and conditions thereof, the undersigned offers and agrees, if this proposal is accepted, to furnish any and all of the items, deliverables or services herein at the prices, terms and delivery stated.

All signatures **MUST** be original. No facsimile, stamped or copied signature will be accepted and is cause for rejection of the proposal. **By signing this form, I affirm that the original Request for Proposals documents have not been altered in any way.**

Authorized Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_

Title: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Business: \_\_\_\_\_ Phone: \_\_\_\_\_

Business Address: \_\_\_\_\_ City/State Zip: \_\_\_\_\_

**APPENDIX C**

Proposal Code Letter: \_\_\_\_\_

(for Racine County use only)

# Racine County Human Services

## Request for Proposal Reference List

### Credible Messengers

### Program # 682

**A letter of support from each reference must be attached to this document.** It is important to provide accurate contact information for each reference listed. Racine County will not attempt to locate incomplete or inaccurate information in names, location or phone numbers. Prior experience on previous Racine County projects may be considered by the County, even if not listed here as a reference.

1. Project/Program Name: \_\_\_\_\_

Individual to be contacted at this site: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

2. Project/Program Name: \_\_\_\_\_

Individual to be contacted at this site: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

3. Project/Program Name: \_\_\_\_\_

Individual to be contacted at this site: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_



**APPENDIX D**

# Racine County Human Services

## Request for Agency Overview Sheet

### Credible Messengers

### Program # 682

Present a clear and concise description of your agency. Points you may want to address include:

**1. Agency Overview:**

- a. What is the location of your primary headquarters and what areas do you serve?
- b. What are your agency's mission and vision statements? How do they relate to this RFP?
- c. What is your organizational structure? Please provide your organizational chart. **(To protect the blind process, only include position titles on the chart, do not include your agency or any employee names).**
- d. Is your agency a non-profit, Racine community based organization?
- e. Are you a legally incorporated, licensed business, registered to work in the State of Wisconsin? **(include only one copy of your business license with the original, this will not be included in the information the evaluation committee reviews to protect the blind process).**
- f. What efforts do you make to ensure diversity in potential candidates for employment within your agency?
- g. What other pertinent agency specifics would provide the evaluation committee with a sense how your company operates?

**2. Experience and Competency:**

- a. How long has your agency been in operation? Please specify agency growth and historical milestones.
- b. What are your agency's areas of specialty?
- c. What is your experience serving and meeting the needs of disadvantaged populations within the community? Please cite specific examples and outcomes.
- d. How does your agency embrace diversity? Provide examples of your agency's cultural competency.
- e. Please describe any prior relevant experience as it relates to this project scope. **(To protect the blind process, generalize any prior work with Racine County, specific RC experience should be outlined in the past performance section in Appendix F).**

**APPENDIX E**

# Racine County Human Services

## Request for Proposal Criteria Sheet

### Credible Messengers

#### Program # 682

All proposals must address each of the following criteria. **You must clearly identify which question each of your answers pertains to** by labeling it with the number of the specific question. **Failure to include all the criteria listed will disqualify the entire proposal.**

**1. Project Plan:**

- a. Describe your project plan. Please include specific engagement strategies for:
  - i. Recruiting Messengers
  - ii. Reaching and inspiring the Youth
- b. How do you plan to implement this program?
- c. What challenges you foresee and how will you address those challenges?
- d. How will you leverage existing community partners and resources?
- e. Project Timeline – complete the attached worksheet (Appendix E1) to demonstrate your process.

**2. Reporting and Data Tracking:**

- a. What is your plan for tracking target population and reporting requirements? Include sample of spreadsheet/database template if possible.
- b. What is your plan for tracking the performance markers outlined in the evaluation outcomes?

**3. Project Positions:**

- a. Please review the attached job descriptions.
  - i. Will the assigned staff be entirely focused on this program or will they have to split their focus with other programs/responsibilities within your agency?
  - ii. How many hours do you anticipate these employees will dedicate per week to this project?
- b. How will the Messengers be screened and trained? Provide a copy of your training program.

**4. Additional Information:**

- a. Why do you believe your agency is better able to operate this program than others?
- b. Any additional information that will help evaluators understand your proposal.

**APPENDIX E**

Proposal Code Letter: _____ (for Racine County use only)
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**APPENDIX E1**

Proposal Code Letter: \_\_\_\_\_  
 (for Racine County use only)

# Racine County Human Services

## Project Plan Timeline

### Credible Messengers

### Program # 682

RECRUIT AND TRAIN CREDIBLE MESSENGERS				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	
ENGAGE AND INSPIRE YOUTH				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	
DELIVERING CURRICULUM				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	
FACILITATED GROUPS AND ENRICHMENT ACTIVITIES				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	

# Racine County Human Services

## Request for Proposal Past Performance

### Credible Messengers

RFP # 682

What previous experience have you had with Racine County Human Services?

***\*Please note, this section must be answered on a separate document.***

- There is no weight for this category. It allows vendors with a past experience with Racine County the opportunity to be recognized for their contributions.
- For those vendors with no prior experience, this category will not be calculated in their scoring and therefore will not impact their overall rating in any way.
- To maintain the blind evaluation process, this section represents scores obtained from other officials within Racine County, who are not part of the evaluation committee. Supporting evidence will be attached to the final scoring sheet.

**APPENDIX G**

# Racine County Human Services

## Request for Proposal Budget Sheet Instructions

### **Credible Messengers**

#### Program # 682

**\*\*\* All Budget information must be submitted in a separate envelope.**

The maximum budget available for this program is \$225,000 for December 5, 2018 – December 31, 2019.

Please complete Appendices G1 and G2 to explain your costs and anticipated expenses. Feel free to add a budget narrative if necessary to properly convey your budget plan.

1. Appendix G1 – carry over your timeline information and add in the anticipated expenses column.
2. Appendix G2 – You are required to complete all 4 worksheets. Incomplete worksheets will not be considered for funding. Instructions are below.

#### **A. Budget Worksheet #1 - Time Allocation of Personnel by Program**

Complete Budget Worksheet #1 to summarize the percent of personnel time allocated to complete each program:

- a. Insert a Program Name as the column heading for each program included in the agency's Application. Please refer to "Line Item Descriptions" for definition of salaries to be charged to programs.  
Distribute the percentage of each individual's time across:
  - (1) Direct Staff FTE
  - (2) Admin/Clerical/Supervision
- b. Insert each employee's name, position title, annual salary and Full-Time Equivalents in the applicable columns of the budget grid. (One FTE or Full-Time Equivalent is equal to 2,080 hours of work per year.)

#### **B. Budget Worksheet #2 – Expense Budget By Program**

- a. Enter the total HSD expense and allocate it across the program.
- b. Enter the total Management and General expense. The percentage of Management and General Expenses cannot exceed 10%. The percentage will be automatically calculated for you if you are using the EXCEL spreadsheet. If you are not using the EXCEL spreadsheet, you will have to manually calculate the percentage.
- c. For definitions of line items, please see "Line Item Description".
- d. If you currently are contracting with HSD for the same program that you are requesting funding for next year, please complete the **row** labeled "Current Year's Program Expense". You need only enter the program expense allocation, not the total. For

**APPENDIX G**

example, if you have a counseling contract for \$100,000 and a case management contract for \$50,000, you would enter \$100,000 and \$50,000 under the columns marked "counseling" and "case management" respectively. You would not enter \$150,000 in the column labeled "Total". Please use the most current program allocation as stated in your contract. If you are using the EXCEL spreadsheet, the percentage of change from this year's funding to next year's request will be calculated automatically. If you are not using the EXCEL spreadsheet, please manually calculate.

**C. Worksheet #3 - Budget Detail**

- a. For the selected line items of Occupancy, Professional Fees, and Client-Related Services, please provide us with the requested detail concerning the cost.

**D. Worksheet #4 - Agency Budget Overview**

**This worksheet is completed, only if you have other revenues supporting the same program that HSD is funding.**

- a. Use Worksheet #4 to provide other revenue sources (United Way, grants, revenue from other counties, etc.) your agency will use to provide services in the proposed program area.
- b. Enter the TOTAL AGENCY EXPENSE BUDGET FOR EACH PROGRAM.
- c. From Worksheet #2, enter the HSD Expense Budget.
- d. The percentage of HSD Expense Budget to your Total Agency Budget will be calculated automatically if you are using the EXCEL spreadsheet. If not, please manually calculate.

**LINE ITEM DESCRIPTIONS**

- a. Salaries  
Salaries and wages earned by an agency's regular employees (full or part-time) and temporary employees, including office temporaries who are directly serving the program for which funding is sought. Management staff may only be included in this category if the management staff is directly supporting the program for which funding is sought, i.e., supervising direct service staff, providing direct counseling. Does not include management staff or management support staff whose primary responsibility is to administer the management, fiscal, or clerical support functions of the total agency; consultants and others engaged on a contractual basis. Include salaries of professional staff, clerical staff, and temporary help who are providing direct services to the program itself. Direct services are defined as services provided to a defined client population and whose work supports the actual delivery of services to that population. All other non-direct service staff shall be incorporated into management and general. Salaries should include all anticipated revenues paid to staff in calendar year as part of salary, bonus, etc.
- b. Employee Benefits  
Amounts paid by an agency for health insurance, pension or retirement benefit plans, or other benefits to employees.
- c. Payroll Taxes  
Social Security taxes, unemployment and workers' compensation insurance premiums payable by employers under federal, state or local laws.

**If fringe benefits (b & c) exceed 30 per cent of Salary, a detailed schedule must be attached.**

**APPENDIX G**d. Professional Fees

Fees and expenses of professional practitioners and consultants who are not employees of the agency, but are engaged as independent contractors for specified services on a fee or other contractual basis.

Professional fees may include:

- Legal fees
- Audit fees (costs associated with the annual audit of agency financial position)
- Electronic data processing (EDP) (costs associated with accounting, data assemblage, etc., using EDP)
- Professional consultants (costs associated with other professional consultants - e.g., medical, psychological, etc.) Vendor shall include description of the professional practitioner and type of service to be provided. This should be incorporated into the program description starting on p. 6.

e. Supplies

Costs of materials and other supplies used by the agency may include small equipment items that will not be capitalized.

Supply costs may also include:

- Recreation, craft
- Food, beverage
- Laundry, housekeeping
- Office supplies
- Duplicating expenses

f. Telephone

Include all telephone, telex, fax and similar expenses.

g. Postage

Include all postage, parcel post, express mail, trucking, and other delivery expenses, including shipping materials.

h. Occupancy

Costs arising from an agency's occupancy and use of owned, leased, or rented offices, buildings, or land. NOTE: This account does not include salaries paid to agency maintenance and custodial employees or depreciation. Those costs should be included under the management and general category.

Occupancy may include:

- Office rent
- Other rent (usually a satellite office or parking space)
- Building insurance (costs arising from insuring physical premises, equipment or public liability; does not include director's or professional liability insurance)
- Electricity
- Heating
- Water/sewer



## APPENDIX G

- Contract maintenance (costs of janitorial service, snow plowing, or grounds maintenance provided by independent contractors)
- Real estate taxes
- Building and grounds supplies (costs related to the normal upkeep of the agency's buildings, offices or properties; should not contain costs for repainting, replastering, etc., which are done at intervals other than annually)
- Miscellaneous occupancy costs (any other maintenance expenses)
- Mortgage principal payments are not allowable expenses; vendor is urged to refer to Allowable Cost Policy, page 12 (space cost), for clarification

i. Rental/Maintenance of Equipment

Cost of renting and maintaining equipment, such as office and program or physical plant equipment. This does not include the replacement of any equipment or vehicle rental.

j. Travel

Include travel expenses and transportation for staff and volunteers of the agency. Also includes seminar/conference (local and out-of-town) fees. Personal car mileage may not exceed the federal/IRS rate.

Travel expenses may include:

- Auto allowance (costs include only regular, fixed payment to staff intended as reimbursement for the use of their personal vehicles on agency business)
- Out-of-town travel (costs include all costs associated with travel for conferences, training seminars, etc. [e.g., air fare, hotel, meals, taxi fare, conference/seminar fees, etc.])
- Local mileage (costs include reimbursement of a per mile basis, at a fixed rate, to staff for the use of their personal vehicles on agency business)
- Local meetings (costs include fees for luncheon/dinner meetings held locally, outside the office)
- Agency vehicle expense (costs include gas, oil, insurance, maintenance, etc., associated with the operation of agency owned vehicles; does not include depreciation)

k. Client Related Costs - Specific Assistance to Individuals

The cost to the agency of assistance or services for a particular client or patient, including assistance rendered by others at the expense of the reporting agency. This category is also designed to include materials and appliances furnished by the agency when they are purchased for or identifiable with a particular client or patient.

Client related costs may include:

- Medical, dental and hospital fees and charges
- Room and board
- Homemaker services
- Client and patient travel
- Food, shelter and clothing

l. Staff Training

Costs of training agency personnel at local or regional educational institutions, including meetings relating to agency activity.

## APPENDIX G

Proposal Code Letter: \_\_\_\_\_

(for Racine County use only)

m. Professional Liability Insurance

Cost of liability insurance pertaining to malpractice, errors and omissions, director's liability, etc. It pertains to the cost of insuring the actions of agency staff and volunteers.

n. Miscellaneous

Expenses that do not fit into the expense line items above. Please include a brief description of what the expense is and how it is necessary as it relates to the contracted program/service.

o. Management & General (M & G)

M & G includes all those costs that contribute to support the program for which you are submitting an Application. It includes those support staff such as director's salary, support staff and related administration costs that do not directly provide services to clients or program components. The Management & General costs cannot exceed 10% of the total allocation for line items a-n.

p. Management & General %

q. Profit

For Profit agencies may follow the State's Allowable Cost Policy.

**APPENDIX G1**

Proposal Code Letter: \_\_\_\_\_  
(for Racine County use only)

# Racine County Human Services

## Project Plan Timeline with Anticipated Expenses

### Credible Messengers

### Program # 682

RECRUIT AND TRAIN CREDIBLE MESSENGERS				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	ANTICIPATED EXPENSES
ENGAGE AND INSPIRE YOUTH				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	ANTICIPATED EXPENSES
DELIVERING CURRICULUM				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	ANTICIPATED EXPENSES
FACILITATED GROUPS AND ENRICHMENT ACTIVITIES				
STRATEGY	TIMELINE/FREQUENCY	KEY PERSONNEL	COMMENTS	ANTICIPATED EXPENSES

\*\*\*You are required to attach agency financials verifying profitability and sustainability.