

Request for Proposals (RFP)

San Diego Regional Center Community Placement Plan For Fiscal Year 2010-2011

AUTHORITY

The San Diego Regional Center (SDRC) for the Developmentally Disabled has identified a need for a variety of resources throughout San Diego and Imperial Counties for consumers exiting the State Developmental Center (DC) or at risk of entering a DC from their current living arrangement. These services are identified in this announcement of start-up funding availability. **SDRC recognizes the State of California is experiencing an unprecedented budget crisis, however we need to continue to plan for those individuals still residing in the Developmental Center. The State Developmental Centers in California continue to close; and community placement is not only a least restrictive placement option for our consumers, but it also requires less funding compared to continuing residence in a Developmental Center. SDRC may elect to fund all, part, or none of the projects, depending on funding availability as approved by Department of Developmental Services (DDS), and the quality of proposals received; and pending the approval of the following projects as written.** Please refer to the attached project list, which briefly describes the service concept and start-up funding availability. These brief descriptions are not intended to limit the types of proposals considered to serve the identified populations. In fact, applications proposing innovative, person-centered service delivery models, as alternatives to the traditional resources described will be favorably considered. **Please Note: Proposals submitted after the indicated timelines will not be considered.**

APPLICANT ELIGIBILITY

Proposals may be submitted by for profit, non-profit, governmental agencies, educational institutions, or individuals. The applicant must have experience in providing services to persons with developmental disabilities. Board members of San Diego-Imperial Counties Developmental Services Inc. and employees of San Diego Regional Center are prohibited from submitting proposals.

SUBMISSION OF PROPOSALS

Please direct all proposals to:

San Diego Regional Center - Community Services
Trisha Glasgow, Resource Coordinator
4355 Ruffin Road, Suite 104
San Diego, CA 92123

Copies of the proposals must be *received* at the above address **no later than 4:00 p.m. on Thursday September 30, 2010**. Proposals received after this deadline will not be considered. Reliance on the postal service will not be an acceptable excuse for late proposals. Faxed copies of the proposals will not be accepted.

PROPOSAL CONTENT AND SUBMISSION

Proposals must comply with the instructions, format, and time lines described in this request. Proposals should be written in 12 point font, Times New Roman or Arial preferred. All pages in the proposal must be numbered consecutively on 8½" by 11" paper and include an identifying footer with the applicant name and project number. The proposal, *including* the required forms and documents, may not be more than eight (8) pages long. **Each applicant must submit an original proposal and six (6) complete copies.** Each copy should be bound only by a single staple.

FORMAT AND APPLICATION REQUIREMENTS

Each proposal will contain three parts as follows:

1. Applicant/Agency Information Form

The Applicant/Agency Information Form, Appendix A, included with this RFP, *must* be used to provide the pertinent information about the applicant. The number of the project that the proposal is intended to address should be included on this form. The information provided should highlight the applicant's ability to implement the proposed project. **This form should contain the dated original signature of an individual with authority to submit the proposal and enter into a binding contract with the San Diego Regional Center.**

2. Proposal Methodology

In *no more than five (5) pages* the applicant should provide information about the proposed project, which should include the following:

- a. The applicant's philosophy and values related to the proposed project and related to how services to persons with developmental disabilities should be delivered.
- b. The outcome objectives that will be achieved at the completion of the proposed project, and the methods by which those outcomes will be documented. This should include the applicant's work plan for the proposed project with corresponding timelines identifying how and when each outcome objective will be met.
- c. A description of the needs of the consumers who will be served by the project.
- d. The applicant's proposed use of personnel, including the selection, management, and training of staff. The types of licensed consultants who will have on-going contracts with the service provider should be clearly identified. **If the applicant's mailing address is outside of the San Diego/Imperial County area, the name and qualifications of the person who will be physically located in the San Diego/Imperial County area and responsible for managing the proposed project should be included.** The names and qualifications of any additional consulting/professional staff (if known) associated with the project should be included.
- e. Identification of the geographic area where services will be provided; **Please Note: San Diego Regional Center's preferred geographic areas are East County and South Bay.**
- f. A description of the proposed environment in which services would be provided, including a description of any special adaptations that may be made to that environment.
- g. An estimate of the monthly on-going funding per consumer that will be required to maintain the services developed. **San Diego Regional Center anticipates the on-going monthly cost to be funded by Regional Center will be no more than the median rate set by DDS of \$8987 per consumer per month in order to meet all the needs of the consumers identified for the project.** This is a funding cap and SDRC *absolutely*

cannot negotiate a rate more than \$8987, and the final determination of the on-going funding provided to the selected project contractors will be based on the services developed.

3. Budget and Financial Information Form

The Budget and Financial Information Form, Appendix B (two pages), included with this RFP, *must* be used to provide information concerning the applicant's finances and the proposed start-up budget for this project. Do not use this form for the estimation of on-going funding requirements.

REPORTING REQUIREMENTS

Each selected project contractor will be required to submit monthly summaries describing progress made toward meeting project objectives to the San Diego Regional Center by the third of each month. These summaries will be attached to the monthly invoices submitted by the contractor. The contractor will submit a final report upon completion of the project. The format for the monthly summaries and invoices will be included in each awardee's contract.

PROPOSAL SELECTION PROCESS

Any proposal may be rejected if it is incomplete or deviates from the specifications in this RFP. **The San Diego Regional Center reserves the right to reject any or all proposals and to cancel the RFP process at its discretion.** Each proposal will be evaluated by an RFP Selection Committee which is an interdisciplinary team of at least 6 members, who will score each proposal individually before coming together as a team to thoroughly review and discuss each proposal and interview applicants, if applicable, and agreeing on a final score for each proposal. A minimum score of 70% is required for the proposal to be considered. Proposals will be evaluated in 5 areas: Agency Description, Project Description, Work Plan/Timelines, Budget/Finances, and Proposal responsiveness. The evaluation will be based on responsiveness, innovation, previous experience of applicant, and demonstrated applicant financial responsibility. The proposal review/selection criteria worksheet is included with this RFP. Additional information may be required from selected applicants with regard to the proposal submitted prior to the awarding of a contract. References will be contacted and interviews may be conducted, particularly if 2 or more proposals are closely scored and/or more information is needed. The interview panel will include at least 2 individuals from the RFP selection committee, using the same questions, and each interviewer will score the responses using the same scoring scale for each interview.

FUNDS

Project descriptions indicate the total amount of funds available for each project. **Actual amount awarded will be contingent upon the budget submitted by the Department of Developmental Services (DDS).** Any project contractor who fails to develop the services specified will be required to return to the San Diego Regional Center any compensation received for start-up expenses. All funds must be expended by June 30, 2011.

ADDITIONAL INFORMATION

Any questions regarding the requirements of this RFP should be directed to:

San Diego Regional Center-Community Services
Trisha Glasgow, Resource Coordinator
4355 Ruffin Rd., Suite 104
San Diego, CA 92123
(858)576-2966

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 1

Service Need: Licensed Residential Facility for 4 adult male and female consumers who have moderate to profound cognitive challenges, a history of severe behavioral challenges such as self-injurious behaviors including head banging; physically aggressive behaviors including biting, hitting, pushing, grabbing, and head butting; elopement; property destruction; smearing and ingesting feces; rectal digging; intense PICA; verbal outbursts and/or screaming; resistiveness; hyperactive; impulsivity; food stealing; and disrobing; may have a history of causing harm or injury to others and/or property, may have a diagnosis on the autism spectrum, may have a diagnosis of Tourette's Syndrome, may have medical/nursing needs (seizure disorder, g-tube, respiratory problems, skin problems, insomnia, diabetes, prone to pneumonia, prone to urinary tract infections and constipation, prone to falls, prone to choking, require a special diet) requiring licensed nursing consultation, may have many age related issues, may require physical assistance with self-care tasks, may have one or many psychiatric diagnoses, may have auditory and/or visual deficits, may require 1:1 staffing due to high frequency and intense behaviors and/or qualifies as a safety risk (i.e. steals food but is on pureed diet), may not participate in structured outside day activities on a consistent basis, and may be non-ambulatory.

Start-up Funding Available: \$150,000

Key Objectives of this project:

1. Locate and establish control of a site for the proposed facility
2. Submit a full program design for the facility to SDRC by April 1, 2011
3. Hire and train staff
4. Obtain the services of appropriate licensed consultants
5. Obtain appropriate licensure for the facility by May 31, 2011
6. Admit 4 consumers identified by San Diego Regional Center by June 30, 2011

SDRC is requesting proposals for licensed residential services for adults with intense, complex needs. These needs include the needs of adult male and female consumers who:

1. have moderate to profound cognitive challenges,
2. have a history of severe behavioral challenges such as self-injurious behaviors including head banging; physically aggressive behaviors including biting, hitting, pushing, grabbing, and head butting; elopement; property destruction; smearing and ingesting feces; rectal digging; PICA; verbal outbursts and/or screaming; resistiveness; hyperactive; impulsivity; food stealing; and disrobing,
3. may have a history of causing harm or injury to others and/or property,
4. may have a diagnosis on the autism spectrum,
5. may have a diagnosis of Tourette's Syndrome,

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 1 (continued)

6. may have medical/nursing needs (seizure disorder, g-tube, respiratory problems, skin problems, insomnia, diabetes, prone to pneumonia, prone to urinary tract infections and constipation, prone to falls, prone to choking, require a special diet) requiring licensed nursing consultation,
7. may have many age-related issues,
8. may require physical assistance with self-care tasks,
9. may have one or many psychiatric diagnoses,
10. may have auditory and/or visual deficits,
11. may require 1:1 staffing due to high frequency and intense behaviors and/or qualifies as a safety risk (i.e. steals food but is on a pureed diet),
12. may not participate in structured outside day activities on a consistent basis, and
13. may be non-ambulatory.

This home should serve both male and female consumers. All 4 consumers should have a private room. At least 2 beds in the home must be classified as non-ambulatory, thus the preferred physical plant would be a single story home. Due to the high risk of elopement, the preferred applicant should propose a home with a delayed egress system. A strong applicant should be able to provide medical/nursing consultation services as needed. The program shall include health maintenance services of a primary medical practitioner, monitoring of psychotropic medications, nursing consultation, nutritional consultation, and/or recreation therapy. A strong applicant should be able to provide a strong behavioral component to address mental health issues and intense behavioral challenges. The preferred staffing schedule should include 2 awake, overnight staff.

The target group of consumers will be residing in a DC or be at risk of entering a DC from their current community living arrangement. The home may potentially be a long-term living arrangement. The provider of the service needs to show a commitment to working with families of consumers who may be reluctant to allow the consumer to move to a licensed facility in the community. Identification and preparation of consumers to move into the facility will involve the provider making multiple trips to the DC's. The home environment may need to be modified to accommodate the needs of consumers, reflected by the available start-up funds. The vehicle to transport consumers should have a lift if appropriate to meet consumer need.

Proposals with a service design clearly integrating person centered approaches and systematic approaches to behavior/skill assessment, intervention, and acquisition; and staff training in these areas will receive the greatest consideration. Proposed facility must be well-maintained, clean, and in a safe environment. Service provider applicants must have prior experience as owners or operators of similar programs and be in good standing with any and all licensing agencies.

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 2

Service Need: Licensed Residential Facility for 4 adult male and female consumers who have mild to severe cognitive challenges, a history of severe behavioral challenges such as self-injurious behaviors including head banging; physically aggressive behaviors including biting, hitting, pushing, grabbing, and head butting; elopement; property destruction including breaking windows; smearing and ingesting feces; rectal digging; intense PICA; verbal outbursts and/or screaming; resistiveness; hyperactive; impulsivity; and disrobing; may have a history of causing harm or injury to others and/or property, may have a diagnosis on the autism spectrum, may have a diagnosis of Tourette's Syndrome, may have medical/nursing needs (seizure disorder, g-tube, respiratory problems, skin problems, insomnia, diabetes, prone to pneumonia, prone to urinary tract infections and constipation, prone to falls, prone to choking, require a special diet) requiring licensed nursing consultation, may have many age related issues, may require physical assistance with self-care tasks, may have psychiatric diagnoses, may have auditory and/or visual deficits, may require 1:1 staffing due to high frequency and intense behaviors, may not participate in structured outside day activities on a consistent basis, and may be non-ambulatory.

Start-up Funding Available: \$150,000

Key Objectives of this project:

1. Locate and establish control of a site for the proposed facility
2. Submit a full program design for the facility to SDRC by April 1, 2011
3. Hire and train staff
4. Obtain the services of appropriate licensed consultants
5. Obtain appropriate licensure for the facility by May 31, 2011
6. Admit 4 consumers identified by San Diego Regional Center by June 30, 2011

SDRC is requesting proposals for licensed residential services for adults with intense, complex needs. These needs include the needs of adult male and female consumers who:

1. have mild to severe cognitive challenges,
2. have a history of severe behavioral challenges such as self-injurious behaviors including head banging; physically aggressive behaviors including biting, hitting, pushing, grabbing, and head butting; elopement; property destruction including breaking windows; smearing and ingesting feces; rectal digging; PICA; verbal outbursts and/or screaming; resistiveness; hyperactive; impulsivity; and disrobing,
3. may have a history of causing harm or injury to others and/or property,
4. may have a diagnosis on the autism spectrum,

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 2 (continued)

5. may have a diagnosis of Tourette's Syndrome,
6. may have medical/nursing needs (seizure disorder, g-tube, respiratory problems, skin problems, insomnia, diabetes, prone to pneumonia, prone to urinary tract infections and constipation, prone to falls, prone to choking, require a special diet) requiring licensed nursing consultation,
7. may have many age-related issues,
8. may require physical assistance with self-care tasks,
9. may have psychiatric diagnoses,
10. may have auditory and/or visual deficits,
11. may require 1:1 staffing due to high frequency and intense behaviors,
12. may not participate in adult day services on a consistent basis, and
13. may be non-ambulatory.

This home should serve both male and female consumers. All 4 consumers should have a private room. At least 2 beds in the home must be classified as non-ambulatory, thus the preferred physical plant would be a single story home. Due to the high risk of elopement, the preferred applicant should propose a home with a delayed egress system. A strong applicant should be able to provide medical/nursing consultation services as needed. The program shall include health maintenance services of a primary medical practitioner, monitoring of psychotropic medications, nursing consultation, nutritional consultation, and/or recreation therapy. A strong applicant should be able to provide a strong behavioral component to address mental health issues and intense behavioral challenges. The preferred staffing schedule should include 2 awake, overnight staff.

The target group of consumers will be residing in a DC or be at risk of entering a DC from their current community living arrangement. The home may potentially be a long-term living arrangement. The provider of the service needs to show a commitment to working with families of consumers who may be reluctant to allow the consumer to move to a licensed facility in the community. Identification and preparation of consumers to move into the facility will involve the provider making multiple trips to the DC's. The home environment may need to be modified to accommodate the needs of consumers, reflected by the available start-up funds. For example, a facility with Plexus-glass or Polycarbonate windows will be necessary for this facility. The vehicle to transport consumers should have a lift if appropriate to meet consumer need.

Proposals with a service design clearly integrating person centered approaches and systematic approaches to behavior/skill assessment, intervention, and acquisition; and staff training in these areas will receive the greatest consideration. Proposed facility must be well-maintained, clean, and in a safe environment. Service provider applicants must have prior experience as owners or operators of similar programs and be in good standing with any and all licensing agencies.

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 3

Service Need: Licensed Residential Facility for 4 adult male and female consumers who have mild to severe cognitive challenges, a dual diagnosis, a history of severe behavioral challenges (such as self-injurious behaviors, physically aggressive including assaultive behaviors, property destruction, inappropriate sexual behavior, elopement, verbal outbursts, disrobing, impulsivity, and resistiveness), may have a history of causing harm or injury to others and/or property, may require physical assistance with self-care tasks, may have visual and/or auditory sensory deficits, may require licensed nursing consultation, may not participate in outside day activities on a consistent basis, and may be non-ambulatory. The consumers served in this home may have temporary periodic hospitalizations due to mental health issues; and will require psychological and psychiatric consultation on an on-going basis.

Start-up Funding Available: \$125,000

Key Objectives of this project:

1. Locate and establish control of a site for the proposed facility
2. Submit a full program design for the facility to SDRC by April 1, 2011
3. Hire and train staff
4. Obtain the services of appropriate licensed consultants
5. Obtain appropriate licensure for the facility by May 31, 2011
6. Admit 4 consumers identified by San Diego Regional Center by June 30, 2011

SDRC is requesting proposals for licensed residential services for adults with intense, complex needs. These needs include the needs of adult male and female consumers who:

1. have mild to severe cognitive challenges,
2. have a dual diagnosis (mental illness and developmental disability),
3. have a history of severe behavioral challenges (such as self-injurious behaviors, physically aggressive including assaultive behaviors, property destruction, inappropriate sexual behavior, elopement, verbal outbursts, disrobing, impulsivity, and resistiveness),
4. may have a history of causing harm or injury to others and/or property,

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 3 (continued)

5. may require physical assistance with self-care tasks,
6. may have visual and/or auditory sensory deficits,
7. may require licensed nursing consultation,
8. may not participate in outside day activities on a consistent basis,
9. may be non-ambulatory,
10. may have temporary periodic hospitalizations due to mental health issues, and
11. will require psychological and psychiatric consultation on an on-going basis.

This home is intended to serve male and female consumers. All 4 consumers should have a private room. It would be preferable to have at least 2 beds in the home classified as non-ambulatory. The preferred applicant should be able to provide a strong behavioral component to address intense behavioral challenges. The preferred staffing schedule should include 2 awake overnight staff.

The target group of consumers will be residing in a DC or be at risk of entering a DC from their current community living arrangement. The home may potentially be a long-term living arrangement. Identification and preparation of the consumers to move into the facility will involve the provider making multiple trips to the consumer's current living environment which could be the DC, County Jail, or a psychiatric hospital. Coordination between the residence and day program will be imperative. The program will include health maintenance services of a primary medical practitioner, monitoring of psychotropic medications, nursing consultation, nutritional consultation, and/or recreational therapy. The home environment may need to be modified to accommodate the needs of the consumers, reflected by the available start-up funds. The vehicle to transport consumers should have a lift if determined necessary to meet consumer need.

Proposals with a service design clearly integrating person centered approaches and systematic approaches to behavioral/skill assessment, intervention, and acquisition; and staff training in these areas will receive the greatest consideration. Proposed facility must be well-maintained, clean, and in a safe environment. Service provider applicants must have prior experience as owners or operators of similar programs and be in good standing with any and all licensing agencies.

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 4

Service Need: Licensed Residential Facility for 4 adult male and female consumers who have mild to severe cognitive challenges, a dual diagnosis, a history of severe behavioral challenges (such as self-injurious behaviors, physically aggressive including assaultive behaviors, property destruction, inappropriate sexual behavior, elopement, verbal outbursts, disrobing, impulsivity, and resistiveness), may have a history of causing harm or injury to others and/or property, may require physical assistance with self-care tasks, may have visual and/or auditory sensory deficits, may require licensed nursing consultation, may not participate in outside day activities on a consistent basis, and may be non-ambulatory. The consumers served in this home may have temporary periodic hospitalizations due to mental health issues; and will require psychological and psychiatric consultation on an on-going basis.

Start-up Funding Available: \$125,000

Key Objectives of this project:

1. Locate and establish control of a site for the proposed facility
2. Submit a full program design for the facility to SDRC by April 1, 2011
3. Hire and train staff
4. Obtain the services of appropriate licensed consultants
5. Obtain appropriate licensure for the facility by May 31, 2011
6. Admit 4 consumers identified by San Diego Regional Center by June 30, 2011

SDRC is requesting proposals for licensed residential services for adults with intense, complex needs. These needs include the needs of adult male and female consumers who:

- 1 have mild to severe cognitive challenges,
- 2 have a dual diagnosis (mental illness and developmental disability),
- 3 have a history of severe behavioral challenges (such as self-injurious behaviors, physically aggressive including assaultive behaviors, property destruction, inappropriate sexual behavior, elopement, verbal outbursts, disrobing, impulsivity, and resistiveness),
- 4 may have a history of causing harm or injury to others and/or property,

SAN DIEGO REGIONAL CENTER COMMUNITY PLACEMENT PLAN PROJECTS

COMMUNITY PLACEMENT PLAN PROJECT 4 (continued)

- 5 may require physical assistance with self-care tasks,
- 6 may have visual and/or auditory sensory deficits,
- 7 may require licensed nursing consultation,
- 8 may not participate in outside day activities on a consistent basis,
- 9 may be non-ambulatory,
- 10 may have temporary periodic hospitalizations due to mental health issues, and
- 11 will require psychological and psychiatric consultation on an on-going basis.

This home is intended to serve male and female consumers. All 4 consumers should have a private room. It would be preferable to have at least 2 beds in the home classified as non-ambulatory. The preferred applicant should be able to provide a strong behavioral component to address intense behavioral challenges. The preferred staffing schedule should include 2 awake overnight staff.

The target group of consumers will be residing in a DC or be at risk of entering a DC from their current community living arrangement. The home may potentially be a long-term living arrangement. Identification and preparation of the consumers to move into the facility will involve the provider making multiple trips to the consumer's current living environment which could be the DC, County Jail, or a psychiatric hospital. Coordination between the residence and day program will be imperative. The program will include health maintenance services of a primary medical practitioner, monitoring of psychotropic medications, nursing consultation, nutritional consultation, and/or recreational therapy. The home environment may need to be modified to accommodate the needs of the consumers, reflected by the available start-up funds. The vehicle to transport consumers should have a lift if determined necessary to meet consumer need.

Proposals with a service design clearly integrating person centered approaches and systematic approaches to behavioral/skill assessment, intervention, and acquisition; and staff training in these areas will receive the greatest consideration. Proposed facility must be well-maintained, clean, and in a safe environment. Service provider applicants must have prior experience as owners or operators of similar programs and be in good standing with any and all licensing agencies.

COMMUNITY PLACEMENT PLAN REQUEST FOR PROPOSAL

PROPOSAL REVIEW/SELECTION CRITERIA

(The minimum requirement will be 70% of the total possible points)

Project Number _____ Applicant /Agency _____

| | Maximum Score | Proposal Score |
|--|----------------------|-----------------------|
| A. Agency Description | | |
| 1. The applicant/agency has prior relevant experience and credentials in the developmental disabilities and/or mental health field. | 10 | |
| 2. The applicant/agency's philosophy is positive, consumer oriented and appropriate to the goals of the proposed project. | 5 | |
| 3. The applicant/agency's history indicates the capability of developing, managing, and operating the proposed project in San Diego County. | 10 | |
| B. Project Description | | |
| 1. The expected service outcomes are clear and consistent with the goals of the proposed project. | 5 | |
| 2. The proposed use of personnel (direct care staff and consultants), including the selection, management and training of staff should ensure quality outcomes in the project. | 15 | |
| 3. The plan for providing services, including the description of the needs of the consumers who will be served, is consistent with the goals of the project. | 5 | |
| C. Work Plan/Timelines | | |
| 1. The work plan indicates a thorough knowledge of the processes and procedures needed to complete the project. | 10 | |
| 2. The timeline for project development is realistic and meets deadlines. | 10 | |
| D. Budget/Finances | | |
| 1. The applicant/agency's financial statement reflects sound fiscal practices. Assets are sufficient to undertake the proposed project. | 5 | |
| 2. The start-up budget is reasonable and demonstrates a good appraisal of actual costs involved in completing the project. | 5 | |
| 3. The estimate for on-going service rate is cost-effective and consistent with funding for similar programs. | 5 | |
| E. Proposal Responsiveness | | |
| 1. The overall proposal indicates an ability to follow directions and is an appropriate response to the RFP | 10 | |
| 2. The proposal provides evidence of innovative practices in providing services. | 5 | |
| TOTAL | 100 | |

Proposal review completed by _____ Signature _____ Date _____

APPLICANT/AGENCY INFORMATION

Applicant/Agency Name _____ CPP Project # _____

Address: _____ Phone: _____

- Non-Profit Corporation
- Local Government Agency

- For-Profit Corporation
- Individual

- Educational Institution
- Other(_____)

Contact Person's Name and Job Title: _____ Phone _____

A. List up to four current or previous services implemented by the applicant/agency that provide evidence of experience related to your proposal. Include the service name, the dates that services started (and ended if not currently being provided), and a one sentence description of the type/purpose of the indicated service:

1. _____

2. _____

3. _____

4. _____

B. List two references that can be contacted in regards to applicant's experience, qualifications and ability to implement this proposal:

1. _____
Name and Title Agency Affiliation
_____ Address Phone
2. _____
Name and Title Agency Affiliation
_____ Address Phone

Application submitted by _____
Signature Date

BUDGET AND FINANCIAL INFORMATION

Applicant/Agency Name _____ CPP Project # _____

FINANCIAL STATUS AS OF _____, 20____

Line of Credit Available? Yes No Amount _____

ASSETS

Cash on hand and in commercial and savings accounts _____

Notes and Receivables _____

Inventory, Equipment, Furniture and Furnishings _____

Real Estate (Market Value) _____

Other Assets: _____

TOTAL ASSETS _____

LIABILITIES

Accounts and Notes Payable (Balance Due) _____

Salaries and Wages Payable _____

Real Estate Loans or Mortgages (Balance Due) _____

Payroll and Real Estate Taxes Payable _____

Other Liabilities: _____

TOTAL LIABILITIES _____

Reference who may be contacted regarding applicant's/agency's qualifications and experience in financial management:

Name/Title _____ Agency/Company _____

Address _____ Phone _____

Budget/Financial Information Submitted by _____
Name Date

BUDGET FOR PROJECT START-UP

PERSONNEL SERVICES (Staff and Consultants)

| Job Title | Number (or %) FTE | FTE Monthly Salary with Fringe Benefit | Number of Months | TOTAL |
|---|-------------------------|--|------------------------|-------|
| 1. _____ | _____ | _____ | _____ | _____ |
| 2. _____ | _____ | _____ | _____ | _____ |
| 3. _____ | _____ | _____ | _____ | _____ |
| 4. _____ | _____ | _____ | _____ | _____ |
| 5. _____ | _____ | _____ | _____ | _____ |
| Employee Fringe Benefits START-UP | (_____ % of Salaries) | | | |
| PERSONNEL SERVICES SUBTOTAL | | | | _____ |

OPERATING EXPENSES

| | Monthly Amount | Number of Months | TOTAL |
|--|-------------------|------------------------|-------|
| Office and/or Facility Lease | _____ | _____ | _____ |
| Insurance | _____ | _____ | _____ |
| Utilities | _____ | _____ | _____ |
| Travel | _____ | _____ | _____ |
| Purchased Equipment and Supplies (list) | | | |
| 1. _____ | _____ | _____ | _____ |
| 2. _____ | _____ | _____ | _____ |
| 3. _____ | _____ | _____ | _____ |
| 4. _____ | _____ | _____ | _____ |
| 5. _____ | _____ | _____ | _____ |
| Other- _____ | _____ | _____ | _____ |
| Administrative Overhead | _____ | _____ | _____ |
| START-UP OPERATING EXPENSES SUB-TOTAL | | | _____ |

**TOTAL START-UP
BUDGET**

Submitted by

Name

Date