REQUEST FOR PROPOSALS
Community Placement Plan 2021-2022

San Diego Regional Center is seeking a proposal for specialized projects focused on individuals with intellectual disabilities and challenging service needs.

**Project 2122-1:** San Diego Regional Center (SDRC) seeks to develop an Enhanced Behavioral Support Home to serve four females who are presently residing at Porterville Developmental Center, Institutes for Mental Disease, and Canyon Springs. This facility will provide enhanced supports as per Welfare and Institutions Code (4684.80). The home will be owned by a housing development corporation (HDO). The individuals have severe behavioral challenges and/or psychiatric disorders. The startup funds available are up to $175,000.

**Project 2122-2:** San Diego Regional Center (SDRC) seeks to develop an Enhanced Behavioral Support Home to serve four adult males who are presently residing at Porterville Developmental Center, Institutes for Mental Disease, and Canyon Springs. This facility will provide enhanced supports as per Welfare and Institutions Code (4684.80). The home will be owned by a housing development corporation (HDO). The individuals have severe behavioral challenges and/or psychiatric disorders. The startup funds available are up to $175,000.

**Project 2122-5:** San Diego Regional Center (SDRC) seeks to develop an Enhanced Behavioral Support Home to serve four adults who are presently residing in Institutes for Mental Disease, Canyon Springs and in the community. This facility will provide enhanced supports as per Welfare and Institutions Code (4684.80). The home will be owned by a housing development corporation (HDO). The individuals have severe behavioral challenges and/or psychiatric disorders. The startup funds available are up to $175,000.

**Project 2122-6:** San Diego Regional Center (SDRC) seeks a service provider to develop a Community Crisis Group Home to support four foster dual agency children in need of crisis intervention services. The program will address complex challenges such as severe behavior challenges and/or psychiatric issues. The home will be owned by a housing development corporation (HDO). The startup funds available are up to $250,000.

Copies of the Request for Proposals are available on the SDRC website at: [http://sdrc.org/service-providers/request-for-proposals](http://sdrc.org/service-providers/request-for-proposals)

If you have questions, please contact Community Services, 858-576-2966.

**SUBMISSION OF PROPOSALS**
Proposals are due NO LATER THAN 4:00 P.M. ON Tuesday, January 11th, 2022.

***Refer to proposal for e-mail instructions.***
Request for Proposals (RFP)
Enhanced Behavioral Support Home
San Diego Regional Center
Community Placement Plan
For Fiscal Year 2021-2022

AUTHORITY

San Diego Regional Center (SDRC) supporting individuals with Intellectual Disabilities has identified a need for a variety of resources throughout San Diego and Imperial counties for individuals with developmental disabilities who require enhanced behavioral supports, staffing, and supervision in a homelike setting. This project will be in collaboration with a Housing Developer Ownership (HDO). SDRC may elect to fund all, part or none of the projects, depending on funding availability as approved by the Department of Developmental Services (DDS), and the quality of proposals received. SDRC reserves the right to withdraw this RFP and/or disqualify any proposal that does not adhere to the RFP guidelines. Please refer to the attached project list, which briefly describes the service concept and start-up funding availability. The brief descriptions are not intended to limit the types of proposals that will be considered to serve the identified populations. In fact, applications that propose 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 can be submitted by service provider entities that are authorized to conduct business within the state of California. 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 send all proposals by e-mail only to:

Erik Peterson, Resource Development Manager
erik.peterson@sdrc.org

Copies of the proposals must be received at the above e-mail address no later than 4:00 p.m. on January 11, 2022. Proposals received after this deadline will not be considered. You will receive an email reply confirming receipt of your proposal. If you do not receive email confirmation, your proposal was not received by SDRC. Please follow up by phone with Erik Peterson if you do not receive confirmation.
PROJECT DESCRIPTION

San Diego Regional Center has identified the need to create an Enhanced Behavioral Support Home (EBSH) to serve 4 adult males who are transitioning from Porterville Developmental Center, Canyon Springs, or Institutes for Mental Disease. The facility will be owned by a Housing Developer Ownership (HDO) and leased to a service provider who will be selected through this Request for Proposal (RFP) process. The service provider’s development team may work with the HDO and Regional Center staff to develop renovation designs for the physical plant structure to support the anticipated behavioral, physical, security and supervision needs of the individuals who will reside at the home. The home will have delayed egress.

The EBSH is an adult residential facility certified by the Department of Developmental Services and licensed by the Department of Social Services. The home will exceed the minimum requirements of level 4I facilities. The home will provide 24-hour nonmedical care to individuals with intellectual disabilities who will require enhanced behavioral supports, staffing, and supervision in a homelike setting as defined in Section 4684.80 of the Welfare and Institutions Code. The EBSH will have a maximum capacity of four clients all of whom will have private bedrooms. The service provider will offer state-of-the-art, evidence-based treatments, individualized, and specifically designed to target the unique needs of this population. The individuals targeted for this home will need intensive services and supports due to the challenging behaviors that cannot be managed in other types of community settings.

Start-up Funding Available up to: $200,000.

FORMAT AND APPLICATION REQUIREMENTS

Proposals must comply with the instructions, format, and timelines 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 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 (22) pages long. Each applicant must submit an original proposal in PDF format via email. Hardcopies will not be accepted.

PROPOSAL CONTENT

Each proposal will contain the following information: Please refer to Title 17, Division 2, Chapter 3, Sub-Chapter 24 for EBSH regulations.

1. **Service Description Summary (12 pages maximum):** Please include all headings and information requested below and provide in the same order in your document.

   a. **Mission, Vision, and Value Statements:** Provide agency MVV statements related to the proposed project.

   b. **Agency Outcomes:** Describe anticipated outcomes of proposed service for people residing the homes and how achievement of outcomes will be measured.
c. **Assessment and Planning:** Briefly describe the planning process. How will individuals’ goals/objectives be determined and progress measured? How will individuals’ supports and services be determined prior to moving into a facility? Please include a description of the entry criteria for individuals who will be served by the project.

d. **Staff Training:** Describe the topics to be covered in staff training, types of training that will occur (e.g., pre-service, on-the-job training, continuing education), who will provide the training, roles of in-house vs. contract consultants, and the specific types of crisis prevention training (e.g., Crisis Prevention Institute or Professional Crisis Management Association) that will be included. Initial and ongoing training, including required certifications. Include any specialized training for providing mental health treatment, behavior support and crisis intervention to individuals who may have a dual diagnosis (mental health diagnosis and intellectual/developmental disability) and may potentially have danger behaviors.

e. **Program Plan requirements:** Include the following:

   i. EBSH shall have a facility program plan which is approved by DDS. Describe the components of this plan.

   ii. Describe the pre-admissions procedures and identify staff responsible for admissions.

   iii. Describe how the facility will ensure appropriate services and supports at the time of admission to meet the client’s immediate needs pending the development of the individual behavioral support plan.

   iv. Describe the services to be provided for the clients residing in the home.

   v. **Staff requirements:** Please list the qualifications and educational requirements for administrator, consultants, direct care lead staff and direct care professionals. Describe staff training.

   vi. Each resident will have an “individual behavior supports plan” developed by the “individual’s behavior supports team”. Describe and address the components of the plan and the members of the “individual’s behavior supports team”.

   vii. Describe the monitoring process of the home as required by law. Include the roles of Regional Center and DDS.

   viii. Describe the facilities Continuous Quality Improvement system.
f. **Staff Recruitment and Retention:** Describe your plan to recruit and retain quality staff.

g. **Staffing Schedule:** Provide a sample one-week staffing schedule including Administrator/Assistant Administrator, direct support professionals, consultant(s), and program prep time.

h. **Transportation:** Describe how transportation will be provided for day/work services, therapy, medical appointments, recreation, legal appointments and other activities.

i. **Community Outreach:** Describe how your agency will work with county agencies to engender support for this project. List which groups or agencies (e.g., city council, probation, judicial, law enforcement, mental health, etc.) you will approach, how you will approach them, and how you will address their objections or ambivalence to ensure successful collaboration for this project.

j. **Equity and Diversity:** Each proposal will include a section on issues of equity and diversity. The plan will address diverse population, including, but not limited to, culturally and linguistically diverse populations. You must also include examples of your commitment in addressing the needs of those diverse populations, and include any relevant issues you deem relevant to equity and diversity. Projects developed specifically for identified clients will only require plans to provide culturally and linguistically competent services and supports to those specific clients.

2. **Development Team:** List the members of the proposed Project Development Team including the name, qualifications and title of the team members. At a minimum, this team should include the lead staff that will develop the response to the RFP, the service design, and the individuals with the expertise to hire skilled consultants and staff to assist the provider in developing the project. If the applicant’s mailing address is outside of San Diego/Imperial County area, the name and qualifications of the person who will be physically located in San Diego/Imperial County area and responsible for managing the proposed project must be included. (1 page)

3. **Applicant/Agency Information Form:** Provide a completed and signed Applicant/Agency Information form (Appendix A). The information provided should highlight the applicant’s ability to implement the proposed project. The form should contain the original signature of an individual with authority to submit the proposal (dated) and enter into a binding contract with San Diego Regional Center. (1 page)
4. **Applicant Disclosure Statement:** A completed and signed Applicant/Vendor Disclosure Statement (Appendix B). (4 pages)

5. **Financial Information:** Include: (Appendix C, D, DS6023, and DS6024, 4 pages total). Appendix C: proposed Start-up Project Budget. Start-up funds are intended to assist in the development of new community resources. Start-up funds are not intended to cover 100 percent of the development costs. It is expected that the applicant will identify funds that their agency will provide, along with CPP funds, in order to demonstrate financial capacity to complete the project. DDS may request an estimated and/or final “Sources and Uses” budget, outlining the project cost and funding sources of Regional Center approved project. Appendix D: Budget and Financial Information, and **Proposed Rate Structure (DS6023 and DS6024):** The rate structure for an EBSH will be established for a facility cost (which is fixed) and an individual cost which is based on the client’s need. Include a sample on the forms DS 6023 and DS 6024).

6. **Community Placement Plan** For reference, Appendix E (Proposal Review/Selection Criteria) will be used to evaluate the proposal. **This does not need to be submitted with your proposal.**

**REPORTING REQUIREMENTS**

Each selected project contractor will be required to submit monthly summaries describing progress made toward meeting project objectives to San Diego Regional Center by the third of each month. These summaries will be attached to any 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.

Contracts between SDRC and the selected service provider will include the following:

a) Holding the vendor accountable for the expenditure of funds consistent with the contract terms and for program outcomes;

b) In the event a project cannot be completed within the approved timeframe, the start-up funds must be returned to the State;

c) Upon completion of the project and the reconciliation of the contract funds, if SDRC determines that the contract amount has not been fully expended, the unexpended contracted funds will be recouped by SDRC and returned to the State; and

d) The Department of Developmental Services may request the Regional Center to provide a copy of the fully executed Regional Center/Vendor Start-up contracts.

**PROPOSAL SELECTION PROCESS**

Any proposal may be rejected if it is incomplete or deviates from the specifications in this RFP. **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 3 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 in order to be considered. Proposals will be evaluated in five areas: Agency Description (including history), Project Description, Work Plan/Timelines, Budget/Finances, and Proposal responsiveness. The specific criteria and weighting are detailed in Appendix D, Rating Criteria. 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 two or more proposals are closely scored and/or more information is needed. The interview panel will include at least two 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 March 31, 2024.

Key Objectives of this project:
1. Acquisition of property and development of the facility - HDO responsibility.
2. Submit licensing application to Community Care Licensing.
3. Submit a full program design for the facility to SDRC.
4. Assess clients who are being referred to project.
5. Hire and train staff.
6. Obtain the services of appropriate licensed consultants.
7. Obtain appropriate licensure for the facility.
8. Admit four (4) residents identified by San Diego Regional Center by 6/30/23.

Additional Information

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

San Diego Regional Center-Community Services  
Erik Peterson, Resource Development Manager  
4355 Ruffin Rd., Suite 104  
San Diego, CA 92123  
(858)576-2872
APPLICANT/AGENCY INFORMATION

Applicant/Agency Name __________________________________________ CPP Project # __________________

Address: ______________________________________________________ Phone: ___________________

☐ Non-Profit Corporation ☐ For-Profit Corporation ☐ Educational Institution
☐ Local Government Agency ☐ Individual ☐ Other___________________

Contact Person’s Name and Job Title: __________________________________________ Phone____________________

E-Mail: ____________________________________________________________

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 __________
APPPLICANT/VENDOR DISCLOSURE STATEMENT

GENERAL INSTRUCTIONS
Every applicant or vendor must complete and submit a current Applicant/Vendor Disclosure Statement, DS 1891 (disclosure statement) as part of a complete application packet for vendorization or upon request of the vendoring regional center. The following instructions are designed to clarify certain questions on the form. Instructions are listed in order of question for easy reference. See 42 CFR 455.101 for additional definitions.

Important:
- IT IS ESSENTIAL THAT ALL APPLICABLE QUESTIONS BE ANSWERED ACCURATELY AND THAT ALL INFORMATION BE CURRENT.
- Parents and consumers of Vouchers, Participant-Directed Services, or Purchase Reimbursements: Complete Part 1 on page 2 and Part 3 on page 3, then proceed to Applicant/Vendor Signature on page 4 to sign and date.
- Failure to disclose complete and accurate information will result in a denial of enrollment and/or may be cause for termination of vendorization.
- Read ALL instructions when completing the disclosure statement.
- Type or print clearly in ink.
- If applicant or vendor must make corrections, please line through, date, and initial in ink. Do not use correction fluid.
- Answer all questions as of the current date.
- If additional space is needed, attach a sheet referencing the part and question being completed.
- Return this completed statement with the complete application package to the regional center to which you are applying.

Part 1: Identifying Information
A. Specify name of the applicant or vendor, agency, facility or organization, vendor number and service code, business address, and telephone number of applicant or vendor submitting the vendor application.
B. Specify in what capacity the applicant or vendor is doing business. For example: The name of the corporation under which they are doing business. This name must match the license name, if applicable.
C. List the National Provider Identifier, of the applicant or vendor, if any.
D. List the Social Security Number, Date of Birth, and/or the Federal Employer Identification Number (EIN) of the applicant or vendor, if any. Enter Vendor's nine-digit EIN assigned by the IRS in the following format: XX-XXXXXXX.
   - An EIN is used to identify the accounts of employers and certain others who have no employees.
   - For more information about an EIN, please check http://www.irs.gov for "Employer Identification Numbers" or "EIN". Whenever this Disclosure Statement requests an EIN about an individual or entity, it has the same meaning.
E. Check the entity type that best describes the structure of your organization.

Part 2: Ownership and Control Interests. Use the following definitions to identify the individuals you should enter in A, B and C of this section. See 42 CFR 455.101 for additional definitions.
- "Indirect Ownership Interest" means an ownership interest in an entity that has an ownership interest in the applicant or vendor. This term includes an ownership interest in any entity that has an indirect ownership interest in the applicant or vendor;
- "Managing Employee" means a general manager, business manager, administrator, director, or other individual who exercises operational or managerial control over, or who directly or indirectly conducts the day-to-day operation of an institution, organization, agency or business entity;
- "Ownership Interest" means the possession of equity in the capital, the stock, or the profits of the applicant or vendor.
- "Person with an Ownership or Control Interest" means a person or corporation that:
  A) Has an ownership interest totaling 5 percent or more in an applicant or vendor;
  B) Has an indirect ownership interest equal to 5 percent or more of an applicant or vendor;
  C) Has a combination of direct or indirect ownership interests equal to 5 percent or more in an applicant or vendor;
  D) Owns an interest of 5 percent or more in any mortgage, deed of trust, note, or other obligation secured by the applicant or vendor if that interest equals at least 5 percent of the value of the property or assets of the applicant or vendor;
  E) Is an officer or director of an applicant or vendor that is organized as a corporation; or
  F) Is a partner in an applicant or vendor that is organized as a partnership.
- "Significant Business Transaction" means any business transaction or series of transactions that, during any one fiscal year, exceed the lesser of $25,000 and 5 percent of an applicant or vendor’s total operating expenses.
"Subcontractor" means an individual, agency, or organization to which an applicant or vendor has contracted or delegated some of the management functions or responsibilities of providing services.

"Wholly Owned Supplier" means a supplier whose total ownership interest is held by an applicant or vendor or by a person, persons, or other entity with an ownership or control interest in an applicant or vendor.

Part 3: Excluded Individuals or Entities. (See page 3. Must be disclosed if applicable.)

"Excluded Individuals or Entities" means those individuals and entities that have been placed on either the U.S. Department of Health and Human Services Office of Inspector General (OIG) List of Excluded Individuals/Entities or the Department of Health Care Services (DHCS) Medi-Cal Suspended and Ineligible Provider List of persons, or individuals and entities that have been convicted of a criminal offense related to involvement in any program under Medicare, Medicaid or the Title XX services program, or those individuals and entities that meet the criteria included in Title 17, Section 54311(a)(6).

Title 17, California Code of Regulations, Section 54311(a)(6) (Criteria for Excluded Individuals or Entities)
The name, title and address of any person(s) who, as applicant or vendor, or who has ownership or control interest in the applicant or vendor, or is an agent, director, members of the board of directors, officer, or managing employee of the applicant or vendor, has within the previous ten years:

(A) Been convicted of any felony or misdemeanor involving fraud or abuse in any government program, or related to neglect or abuse of an elder or dependent adult or child, or in any connection with the interference with, or obstruction of, any investigation into health care related fraud or abuse; or

(B) Been found liable any civil proceeding for fraud or abuse involving any government program; or

(C) Entered into a settlement in lieu of conviction involving fraud or abuse in any government program.

PLEASE FILL OUT

Part 1. Applicant/Vendor Information
A. Name of applicant or vendor, entity, agency, facility, or organization as reported to IRS:

________________________________________
Vendor Number and Service Code:

________________________________________
Business Address:

________________________________________
Telephone number (with area code):

B. Name registered with California Secretary of State, if any:

________________________________________

C. National Provider Identifier (NPI), if any:

________________________________________

D. Social Security Number (SSN), Date of Birth (DOB), and/or Federal Employer Identification Number (EIN), if any:

________________________________________

E. Check the entity type that best describes the structure of the applicant or vendor individual, business entity, agency, facility or organization: Check only one box:

O Sole Proprietor (Unincorporated)

O General Partnership

O Limited Partnership

O Limited Liability Partnership

O Limited Liability Company: State of formation: _____________

O Governmental

O Corporation: Corporate number: _____________ State incorporated: _____________

O Nonprofit — Check One:  

° Unincorporated Association

° Religious/Charitable

° Corporation

° Other (specify): _____________
Part 2. Ownership, indirect ownership, and managing employee interests (If not applicable, please indicate.)

A. List the name(s), title(s), address(es), SSNs, and DOBs of individuals for organizations having direct or indirect ownership interests, and/or managing employees in the applicant/vendor (see instructions for definitions). Also list all members of a group practice. Attach additional pages as necessary to list all officers, owners, management and ownership individuals and entities.

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B. List those persons named in 'A' above or 'Part 4. A' below, that are related to each other as spouse, parent, child, or sibling.

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C. List the name, address, vendor number and service code, SSN, NPI and/or EIN of any other applicant or vendor in which a person with an ownership or controlling interest in the applicant or vendor also has an ownership or control interest of at least 5 percent or more. For example: Are any owners of the applicant or vendor also owners of Medicare or Medicaid facilities? (Example: sole proprietor, partnership or members of Board of Directors.)

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Part 3. Excluded Individuals or Entities (If not applicable, please indicate.)

List the name, title, and address of any person, as applicant or vendor, or entity with an ownership or control interest, any agent, director, officer, or managing employee of the applicant or vendor who is an excluded individual or entity, as defined on page 2.

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Part 4. Subcontractor (If not applicable, please indicate.)

A. List the name, title, address, SSN, NPI and/or EIN of each person or entity with an ownership or control interest in any subcontractor in which the applicant or vendor has direct or indirect ownership of 5 percent or more. State percentage.

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B. List the name, title, address, SSN, NPI and/or EIN of each subcontractor or wholly owned supplier in which the applicant or vendor has had any significant business transactions within 5 years of the application or request.

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APPLICANT/VENDOR SIGNATURE

Knowingly and willfully failing to fully and accurately disclose the information requested may result in denial of a request to become vendored, or if the service provider already is vendored, a termination of its vendorization.

By signing this disclosure statement, you hereby certify and swear under penalty of perjury that (a) you have knowledge concerning the information above, and (b) the information above is true and accurate. You agree to inform the vending Regional Center, in writing, within 30 days of any changes or if additional information becomes available.

Name of Applicant/Vendor or Authorized Representative | Title

| Signature | Date |

Recordkeeping and Access to Records

Subject to the provisions of Title 17, California Code of Regulations, Section 54311 and Code of Federal Regulations, Title 42, Part 455.105, an applicant or vendored provider agrees to provide access for the review of any and all ownership disclosure information and/or documentation upon written request by the vending regional center, the Department of Developmental Services, the State Medicaid Agency, Department of Health Care Services, any State survey team, the Secretary of the United States Department of Health and Human Services, or any duly authorized representatives of the above named entities.

Privacy Statement

All information requested on the application and the disclosure statement is mandatory with the exception of the social security number for any person other than the person or entity for whom an IRS Form 1099 must be provided by the Department of Developmental Services pursuant to 26 USC 6041. This information is required by the authority of Welfare and Institutions Code, Section 4648.12 and Title 17, California Code of Regulations, Section 54311. The consequences of not supplying the mandatory information requested are denial of vendorization as a regional center vendor or termination of vendorization. Any information may also be provided to the State Controller’s Office, the California Department of Justice, the Department of Consumer Affairs, other state or local agencies as appropriate, fiscal intermediaries, managed care plans, the Federal Bureau of Investigation, the Internal Revenue Service, Medicare Fiscal Intermediaries, Centers for Medicare and Medicaid Services, Office of the Inspector General, Medicaid, or licensing programs in other states.
# BUDGET FOR PROJECT START-UP

## PERSONNEL SERVICES (Staff and Consultants)

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<tr>
<th>Job Title</th>
<th>Number (or %) FTE</th>
<th>FTE Monthly Salary with Fringe Benefits</th>
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### START-UP PERSONNEL SERVICES SUBTOTAL

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## OPERATING EXPENSES

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<td>Insurance</td>
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<td>Utilities</td>
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<td>Travel</td>
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<td>Purchased Equipment and Supplies (list)</td>
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<tr>
<td>Other-</td>
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<tr>
<td>Administrative Overhead</td>
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### START-UP OPERATING EXPENSES SUB-TOTAL

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## TOTAL START-UP BUDGET

Submitted by

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
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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
## COMMUNITY PLACEMENT PLAN REQUEST FOR PROPOSAL

**PROPOSAL REVIEW/SELECTION CRITERIA**  
*(The minimum requirement will be 70% of the total possible points)*

<table>
<thead>
<tr>
<th></th>
<th>Maximum Score</th>
<th>Initial Proposal Score</th>
<th>Final Score</th>
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<tbody>
<tr>
<td><strong>A. Agency Description</strong></td>
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<tr>
<td>1. Proposal demonstrates applicant/agency’s experience, skills, philosophy of service in the field of developmental disabilities and/or mental health.</td>
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<tr>
<td>2. References provide reliable evidence of applicant/agency’s qualifications, quality of services and ability to maintain positive working relationships.</td>
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<tr>
<td>3. The applicant/agency’s history indicates the capability of developing, managing, and operating the proposed project in San Diego County.</td>
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<tr>
<td><strong>B. Project Description</strong></td>
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<tr>
<td>1. Proposal describes the training techniques and instructional methods that the program will incorporate to achieve successful outcomes for the clients served.</td>
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<tr>
<td>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.</td>
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<tr>
<td>3. Proposal includes sound program components and strategies that will be used to serve the clients highlighted in the RFP. The proposal includes a plan to ensure the health and safety of those served.</td>
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<td><strong>C. Work Plan/Timelines</strong></td>
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<td>1. The work plan indicates a thorough knowledge of the processes and procedures needed to complete the project.</td>
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<td>2. Applicant/agency included realistic objectives and timelines to achieve measurable objectives that will result in the completion of the project.</td>
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<td><strong>D. Budget/Finances</strong></td>
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<tr>
<td>1. The applicant/agency’s financial statement reflects sound fiscal practices. Assets are sufficient to undertake the proposed project.</td>
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<tr>
<td>2. The start-up budget is reasonable and demonstrates a good appraisal of actual costs involved in completing the project.</td>
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<td>3. The estimate for on-going service rate is cost-effective and consistent with funding for similar programs.</td>
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<td><strong>E. Proposal Responsiveness</strong></td>
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<tr>
<td>1. The overall proposal indicates an ability to follow directions and is an appropriate response to the RFP</td>
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<td>2. The proposal provides evidence of innovative practices in providing services.</td>
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<td><strong>TOTAL</strong></td>
<td>100</td>
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Proposal review completed by: ___________________________  
Signature: ___________________________  
Date: ___________________________

SDCAA\Projects\CPP Start-Up\CPP RFP Appendix D Criteria.Docx updated 12/15/21