



**City of Seattle
Human Services Department**

**2014
Housing Stability Tenant Education
Letter of Intent (LOI)**



City of Seattle
Human Services Department

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City of Seattle

Human Services Department

LETTER OF INTENT GUIDELINES

I. INTRODUCTION

The City of Seattle Human Services Department is issuing this Letter of Intent (LOI) in response to City Council Green Sheet 86-2-A-1, which added \$100,000 in General Fund to provide expanded service capacity for tenant outreach, education, and technical assistance. This LOI was informed by community conversations and a gap analysis conducted with agencies currently providing services in these areas.

Awards for funding will cover the period of May 15, 2014 – December 31, 2014. Future funding will be contingent upon performance and funding availability.

All materials and updates to the LOI are available at: www.seattle.gov/humanservices/funding/

If you have any questions about the LOI Guidelines or Application process, please send questions to: Lindsey Garrity, LOI Coordinator, at Lindsey.Garrity@seattle.gov. All questions and answers about the LOI Application, Guidelines, or process will be posted online at: www.seattle.gov/humanservices/funding/.

Questions should be submitted via email only, and will be answered via email. The final day to ask questions related to this LOI is Monday, April 7, 2014 at 12:00 p.m., in order to allow adequate time for all questions and answers to be posted online and viewed by all applicants.

II. TIMELINE

| Action | Date |
|-------------------------------------|--|
| Community Meeting / Gap Analysis | Monday, 3/17/2014 |
| Letter of Intent Released | Wednesday, 3/26/2014 |
| Final Day for LOI Related Questions | Monday, 4/7/2014 by 12:00 p.m. |
| Proposals Due | Thursday, 4/10/2014 by 12:00 p.m. NO LATE PROPOSALS WILL BE ACCEPTED |
| Planned Award Notification | Wednesday, 4/23/2014 |
| Contract Start Date | Estimated 5/15/2014 |

Completed proposal packets are due by 12:00 p.m. on Thursday, April 10, 2014.

Proposal packets must be received in person, by mail, or electronic submission. No faxed or e-mailed proposals will be accepted. Proposals must be received and date/time stamped by the 12:00 p.m. deadline. Late proposals will not be accepted or reviewed for funding consideration.

- Electronic Submittal: Proposals may be submitted electronically via HSD's Online Proposal Submission System at <http://web1.seattle.gov/hsd/rfi/index.aspx>.
- Hand Delivery or US Mail: The proposal packet can be hand-delivered or mailed to:

Seattle Human Services Department
LOI Response – Housing Stability Tenant Education
Attn: Lindsey Garrity

Delivery Address
700 5th Avenue, Suite 5800
Seattle, WA 98124-4215

Mailing Address
P.O. Box 34215
Seattle, WA 98124-4215

III. HSD GUIDING PRINCIPLES

In addition to the investment outcomes stated in this Letter of Intent, investments will reflect the Seattle Human Services Department's vision, mission and values and support the Department's strategic planning work and initiatives.

Vision

The vision of the Seattle Human Services Department is that all basic needs in our communities are met through innovative and collaborative approaches. Greater Seattle is a place where the richness of our diversity is valued, all of our communities thrive, and people grow up and grow old with opportunity and dignity.

Mission

The mission of the Seattle Human Services Department is to connect people with resources and solutions during times of need so we can all live, learn, work and take part in strong, healthy communities.

Values

We accomplish our mission by adhering to core values and funding programs whose work supports them:

- Vision – we are future-focused, funding outcomes that create a stronger community.
- Innovation – we foster an environment where creativity and new approaches are valued, tested, refined and implemented.
- Results – we fund and administer programs that are accountable, cost-effective, and research-based, ensuring people receive high-quality services.
- Equity – our resources are devoted to addressing and eliminating racial, social, economic, and health disparities in our community.
- Creative collaboration – we share the collective wisdom of our colleagues and community to develop and implement programs.
- Service – we ensure the programs we support are accessible to all community members and deliver high-quality, welcoming customer service.

IV. PROGRAM REQUIREMENTS

A. Performance Commitments

The goal of the HSD LOI investment is to increase agency capacity to provide increased proactive outreach, education, engagement, and technical assistance to low- and very low-income tenants regarding tenants' rights. Outreach will focus on building community capacity within underserved communities, through increased language access (written materials, advertisements, etc.), education about tenants' rights, and connections to existing resources.

B. Reporting Requirements

The agency awarded funding will submit regular status reports and data demonstrating the effectiveness of services provided in achieving the program's milestones, performance goals, and objectives. All reports shall be submitted to HSD by the appropriate deadlines. If reports are not received in a timely manner or not completed, invoices will be held for payment until all pending reports are received and approved.

C. Homeless Management Information System (HMIS) Participation

Safe Harbors HMIS is a countywide data management tool designed to facilitate data collection on programs serving homeless individuals and families, in order to improve human services delivery throughout King County. Participation in the Safe Harbors HMIS is required of all agencies receiving funding through this LOI.

V. CONTRACTING REQUIREMENTS

- Any contract resulting from this LOI will be between the City of Seattle Human Services Department and the applicant organization. Requests to subcontract with a partner organization must be included as part of this proposal, and approved by HSD in writing.
- Contracts may be amended to ensure that services and outcomes align with community needs, or changes in availability of funding.
- Contractors will be required to comply with the Terms and Conditions of the Human Services Department Master Agency Service Agreement (MASA). These requirements shall be included in any contract awarded as a result of the LOI and are not negotiable. A copy of the MASA is available at <http://www.seattle.gov/humanservices/funding/>.
- HSD will attach Exhibits and Attachments to all resulting contracts which will further specify program terms, rules, requirements, guidelines and procedures.
- Contractors will be required to maintain books, records, documents, and other evidence directly related to performance of the work in accordance with Generally Acceptable Accounting

Procedures. The City of Seattle, or any of its duly authorized representatives, shall have access to such books, records and documents for inspection, audit, and copying for a period of seven (7) years after completion of work.

- Contractors must complete all required reports and billing documentation as stated in the contract. Reimbursement will be contingent upon receipt and approval of required reports. Additional data may be required for audit or evaluation purposes. All programs funded through this LOI must publicly recognize HSD's contribution to the program.
- Contractors will maintain a public liability insurance policy with a minimum limit of \$1,000,000, naming the City of Seattle as insured.
- Contractors must have the capacity to protect and maintain all confidential information gained by reason of this contract against unauthorized use, access, disclosure, modification or loss.
- Funds may **not** be used for lobbying or organizing activities.

VI. SELECTION PROCESS

This Letter of Intent process is competitive. Agencies must demonstrate the capacity to meet all of the program requirements. All interested parties must submit a complete proposal packet to be considered for funding. Proposals must meet minimum eligibility qualifications to be evaluated by members of the review committee. An eligibility screening will verify that the proposal is complete (responds to all questions and includes all of the items included on the checklist) and is submitted on time.

Each proposal will be evaluated and rated on whether the program demonstrates capacity to meet the requirements listed in the LOI. The review committee will forward its funding recommendations to the HSD Director. Notification of funding will be sent to the Executive Director of the applicant organization.

HSD reserves the right to make awards without further discussion of the proposal submitted. Therefore, the proposal should be submitted on the most favorable terms. If the proposal is selected for funding, the proposer should be prepared to accept the proposed terms for incorporation into a contract resulting from this LOI process.

HSD also reserves all rights not expressly stated in this process, including making no awards or awarding partial funding and negotiating with any proposer regarding the funding amount and other terms of any contract resulting from this LOI.

VII. APPEAL PROCESS

A proposer is any legal entity that has responded to a formal process (Request for Investments (RFI), Request for Qualifications (RFQ), Request for Proposals (RFP), Letter of Intent (LOI), bid requests, notice of funding availability or similar process) conducted by the Human Services Department (HSD) in soliciting applications for the provision of defined services. Proposers have the right to protest or appeal certain decisions in the award process made by HSD.

A. Grounds for Appeals:

Only an appeal alleging an issue concerning the following subjects shall be considered:

- A matter of bias, discrimination, or conflict of interest;
- Violation of policies or guidelines established in the LOI; and/or
- Failure to adhere to published criteria and/or procedures.

B. Appeals Deadlines:

- 1) The Human Services Department will notify all proposers in writing of the acceptance or rejection of the proposal, and if appropriate, the level of funding to be allocated
- 2) Within ten (10) working days from the date of the written notification, the proposer may submit a written appeal to the HSD Director.
- 3) The HSD Director will review the written appeal and may request additional oral or written information from the appellant organization. A written decision of the HSD Director will be made within ten (10) working days of the receipt of the appeal. The HSD Director's decision is final.
- 4) If an appeal is filed, no new contracts resulting from the solicitation may be finalized until the appeal process is completed or the appeal resolved. An appeal may not prevent HSD from issuing an interim contract for services to meet critical client needs.

C. Appeals Form and Content:

A notice to HSD staff that a proposer intends to appeal does not reserve the right to an appeal. The proposer must actually file an appeal within the required deadlines, and following proper format. A casual inquiry, complaint, or an appeal that does not provide the facts and issues, and/or does not comply with the form, content or deadlines herein, will not be considered or acted upon as an appeal.

All appeals shall be in writing and state that the proposer is submitting a formal appeal. Deliveries by hand, mail, or e-mail are acceptable. Faxed appeals will not be accepted. HSD is

not responsible to assure an appeal is received by HSD within the appeals deadlines. If HSD staff does not receive the appeal in a timely manner, the protest can be rejected. Address the appeal to:

Catherine Lester, HSD Interim Director
700 5th Ave., Suite 5800
P.O. Box 34215
Seattle, WA 98124-4215
Catherine.Lester@seattle.gov

Include the following information in your appeal letter. Include all information you want considered within the package you submit. Failure to provide the following information can result in rejection of your appeal if the materials are not sufficient for HSD to adequately consider the nature of your appeal:

- a. Agency name, mailing address, phone number, and name of individual responsible for submission of the appeal;
- b. Specify the LOI title;
- c. State the specific action or decision you are appealing;
- d. Indicate the basis for the appeal including specific facts;
- e. Indicate what relief or corrective action you believe HSD should make;
- f. Demonstrate that you made every reasonable effort within the LOI schedule to resolve the issue, including asking questions, attending information sessions, seeking clarification, and otherwise alerting HSD to any perceived problems; and
- g. Signed by an authorized agent of the Agency.

D. Appeals Process

The HSD Director will review the appeal. All available facts will be considered and the HSD Director shall issue a final decision. This decision shall be delivered in writing by e-mail, fax, or mailed notice to the proposer making the appeal.

Each written determination of the appeal shall:

1. Find the appeal lacking in merit and uphold the City action; or
2. Find only immaterial or harmless errors in HSD's LOI process and therefore reject the appeal; or

3. Find merit in the appeal and proceed with appropriate action, which may include but is not limited to rejecting all intended awardees or re-tabulating scores.

If HSD finds the appeal without merit, HSD may continue with the funding process and enter into a contract with the successful proposer(s). Even if the appeal is determined to have merit, HSD may issue an interim contract for services to meet critical client needs. Nothing herein shall diminish the authority of HSD to enter into a contract, whether an appeal action or intention to appeal has been issued or otherwise.

VIII. PERFORMANCE COMMITMENTS

Agencies will report on client outcomes through performance commitments. Specific numerical goals for performance commitments will be determined during contract negotiations. Examples of performance commitments are shown below:

- Low-income households increase their knowledge about tenants' rights.
- Unduplicated low-income households are able to increase their housing stability through tenant outreach and education activities.
- Low-income households receive information and/or service referrals that support increased housing stability.



City of Seattle

Human Services Department

2014

Housing Stability Tenant Education

Letter of Intent (LOI)

APPLICATION INSTRUCTIONS AND MATERIALS

This Instructions and Materials packet contains information and materials for agencies responding to the Housing Stability Tenant Education Letter of Intent (LOI) Guidelines. The LOI Guidelines is a separate document that outlines the LOI submission and award process and provides more details on the service and funding requirements.

I. SUBMISSION INSTRUCTIONS & DEADLINE

Completed proposal packets are due by 12:00 p.m. on Thursday, April 10, 2014.

Proposal packets must be received in person, by mail, or electronic submission. No faxed or e-mailed proposals will be accepted. Proposals must be received and date/time stamped by the 12:00 p.m. deadline. Late proposals will not be accepted or reviewed for funding consideration.

- **Electronic Submittal:** Proposals may be submitted electronically via HSD's Online Proposal Submission System at <http://web1.seattle.gov/hsd/rfi/index.aspx>.
- **Hand Delivery or US Mail:** The proposal packet can be hand-delivered or mailed to:

Seattle Human Services Department
LOI Response – Housing Stability Tenant Education
Attn: Lindsey Garrity

Delivery Address

700 5th Avenue, Suite 5800
Seattle, WA 98124-4215

Mailing Address

P.O. Box 34215
Seattle, WA 98124-4215

II. FORMAT INSTRUCTIONS

- A. Proposals will be rated only on the information requested and outlined in this LOI. Do not include brochures, or letters of support. Proposals that do not follow the required format will be deemed unresponsive and will **not** be rated.
- B. The proposal should be typed or word processed on double-sided, letter-sized (8 ½ x 11-inch) sheets. Please use one-inch margins, single spacing, and minimum size 12-point font.
- C. The narrative may not exceed a total of five (5) pages. The Cover Sheet, Budget, and other required forms do not count towards the five (5) page limit.
- D. Please format your response in the order of the questions. You do not need to rewrite the questions.
- E. Complete and attach the required forms, which can be found in Section VI, Proposal Attachments.

III. PROPOSAL NARRATIVE & FORMS

A. Proposal Cover Sheet (Attachment 1)

- Complete Attachment 1: Proposal Cover Sheet
The Cover Sheet must be completed and signed by the Agency representative authorized to submit the proposal to HSD.

B. Proposal Narrative (90 out of 100 points)

1. Housing Stability Tenant Education Model (25 points)

Describe the model your agency is proposing to provide outreach, education, and technical assistance to low- and very-low income tenants in Seattle. Available funds are intended to increase organizational capacity, through staffing or volunteers, to provide proactive outreach to increase knowledge of tenants' rights, site-specific tenants-rights workshops, tenants-rights counseling, and appropriate connections to services, to support increased housing stability among low- and very-low income tenants in Seattle. The model should support increased tenant education and build community capacity in underserved communities through increased language access (online & print resources), and use appropriate outreach methods for the community.

Describe the specific services to be offered by your agency; note whether these services are new services or an expansion of existing services. Describe any resources you plan to leverage. Describe the proposed outcome(s) your program will achieve, including:

- Total number of clients (either individuals or households) estimated to be served;
- Number of outreach contacts;
- Number of tenants' rights workshops to be held.

For agencies proposing to subcontract: Describe the specific services to be offered by the subcontracted agency, and how these support the overall program model to provide tenant outreach & education. Describe how these services meet the goals of the LOI. Describe the proposed outcome(s) to be achieved by the subcontracted agency.

2. Partnerships & Population to be Served (25 points)

Describe the specific population(s) to be served, and how your agency will identify neighborhoods, buildings, and/or individuals for proactive outreach. Describe the specific qualifications of your agency to work with these population(s). Note whether there will be newly-served populations. Funds are intended to serve underserved communities, such as communities with Limited English Proficiency, seniors, immigrant & refugee communities, and people with a disability. Include any relevant data that supports your service delivery model, and illustrates unmet need within the communities your agency is proposing to serve.

Describe how your agency will work with partners to provide an inclusive set of services that support housing stability. Referral partners should include (but are not limited to) legal assistance, eviction prevention, supportive services at local human services agencies, emergency food assistance, and the Seattle Financial Empowerment Centers. Describe how your program will provide appropriate referrals to partner agencies.

For agencies proposing to subcontract: Describe the specific population(s) that will be served through subcontracting. Describe the specific qualifications of the subcontracted agency to work with these populations.

3. Agency Experience (15 points)

Describe your agency's experience and success providing outreach, education, and technical assistance to very low-income tenants in Seattle. Describe agency experience in providing an inclusive set of services, either at your agency or through referral partners. Please provide specific data that illustrates your agency's successes in these areas.

For agencies proposing to subcontract: Describe the subcontracted agency's experience providing tenant education & outreach to the target populations. Include any specific data that illustrates agency success in providing these services.

4. **Cultural Competency** (15 points)

Describe your agency's plan for ensuring that all outreach efforts and services to be delivered under this proposal are culturally and linguistically appropriate for the population being served. Describe how your agency supports staff members to be culturally competent.

For agencies proposing to subcontract: Describe the subcontracted agency's plan for ensuring services are culturally and linguistically appropriate for the population, and how the subcontracted agency supports staff members to be culturally competent.

5. **Agency Capacity & Timeline** (10 points)

Describe your agency's capacity to quickly either expand existing services or launch new services by May 15, 2014, to meet the needs identified here. Include a timeline for the expansion of existing services and/or the launch of new services.

For agencies proposing to subcontract: Describe the subcontracted agency's capacity to quickly expand services for the target population(s).

C. **Budget (10 out of 100 points)**

- Complete Attachment 2 : *Proposed Program Budget Summary*

The budget form should reflect the costs for May 15, 2014 – December 31, 2014, for the proposed program only, not the agency's total budget. Be sure to provide sufficient detail, as requested in the budget forms, using the BARS Classification of Expenditures format. (See Attachment 5, Classification of Expenditures Guidelines.)

- Complete Attachment 3: *Proposed Budget - Personnel Detail Form*

Indicate source of funding for each position and break out specific personnel benefits, i.e., FICA, pensions/retirement, industrial insurance, health/dental care, and unemployment compensation. The number and type of personnel included must be reflective of the type(s) of service and level of performance proposed.

For Agencies Proposing to Subcontract: If your agency is proposing to subcontract a portion of the funds to a partner agency, you must complete the following forms in addition to Attachments 2 & 3:

- Complete Attachment 4, *Subcontracting Partner – Budget Narrative*

IV. RATING CRITERIA

(1) **Housing Stability Tenant Education Model** (25 points)

Describe the model your agency is proposing to provide outreach, education, and technical assistance to low- and very-low income tenants in Seattle. Available funds are intended to increase organizational capacity, through staffing or volunteers, to provide proactive outreach to increase knowledge of tenants' rights, site-specific tenants-rights workshops, tenants-rights counseling, and appropriate connections to services, to support increased housing stability among low- and very-low income tenants in Seattle. The model should support increased tenant education and build community capacity in underserved communities through increased language access (online & print resources), and use appropriate outreach methods for the community.

Describe the specific services to be offered by your agency; note whether these services are new services or an expansion of existing services. Describe any resources you plan to leverage. Describe the proposed outcome(s) your program will achieve, including:

- Total number of clients (either individuals or households) estimated to be served;
- Number of outreach contacts;
- Number of tenants' rights workshops to be held.

For agencies proposing to subcontract: Describe the specific services to be offered by the subcontracted agency, and how these support the overall program model to provide tenant outreach & education. Describe how these services meet the goals of the LOI. Describe the proposed outcome(s) to be achieved by the subcontracted agency.

Criteria:

- There is sufficient staff or volunteers to appropriately deliver the services as described in the proposal.
- Agency describes specific services provided by agency and/or subcontractor, which align with the overall service model.
- Eligible services to be provided include:
 - Proactive outreach (“door-knocking”) in underserved communities;
 - Phone or in- person counseling;
 - Development or maintenance of online web-based resources;
 - Site specific tenants-rights workshops (conducted in multiple languages); and
 - Creation and distribution of written education materials.

(2) Partnerships & Populations to be Served (25 points)

Describe the specific population(s) to be served, and how your agency will identify neighborhoods, buildings, and/or individuals for proactive outreach. Describe the specific qualifications of your agency to work with these population(s). Note whether there will be newly-served populations. Funds are intended to serve underserved communities, such as communities with Limited English Proficiency, seniors, immigrant & refugee communities, and people with a disability. Include any relevant data that supports your service delivery model, and illustrates unmet need within the communities your agency is proposing to serve.

Describe how your agency will work with partners to provide an inclusive set of services that support housing stability. Referral partners should include (but are not limited to) legal assistance, eviction prevention, supportive services at local human services agencies, emergency food assistance, and the Seattle Financial Empowerment Centers. Describe how your program will provide appropriate referrals to partner agencies.

For agencies proposing to subcontract: Describe the specific population(s) that will be served through subcontracting. Describe the specific qualifications of the subcontracted agency to work with these populations.

Criteria:

- Agency clearly articulates a plan to meet the tenant outreach and assistance needs of low-income tenants within specific target population group(s) identified in the proposal.
- Agency describes an inclusive set of services.
- Agency has sufficient referral partners to support inclusive services delivery, and describes a method to ensure appropriate referrals.

(3) Agency Experience (15 points)

Describe your agency's experience and success providing outreach, education, and technical assistance to very low-income tenants in Seattle. Describe agency experience in providing an inclusive set of services, either at your agency or through referral partners. Please provide specific data that illustrates your agency's successes in these areas.

For agencies proposing to subcontract: Describe the subcontracted agency's experience providing tenant education & outreach to the target populations. Include any specific data that illustrates agency success in providing these services.

Criteria:

- Agency provides specific examples of providing an inclusive set of services that support tenant education, outreach, and technical assistance.
- Agency is able to list resources (staff, expertise, partners, and connections to mainstream resources) that will assist them in working with low-income tenants.
- Agency is able to provide quantitative or qualitative data that illustrates agency success in these areas.

(4) Cultural Competency (15 points)

Describe your agency's plan for ensuring that all outreach efforts and services to be delivered under this proposal are culturally and linguistically appropriate for the population being served. Describe how your agency supports staff members to be culturally competent.

For agencies proposing to subcontract: Describe the subcontracted agency's plan for ensuring services are culturally and linguistically appropriate for the population, and how the subcontracted agency supports staff members to be culturally competent.

Criteria:

- Agency describes a plan to ensure all outreach and services provided are culturally and linguistically appropriate.
- Agency actively promotes cultural competency for agency staff members.

(5) Agency Capacity & Timeline (10 points)

Describe your agency's capacity to quickly either expand existing services or launch new services by May 15, 2014, to meet the needs identified here. Include a timeline for the expansion of existing services and/or the launch of new services.

For agencies proposing to subcontract: Describe the subcontracted agency's capacity to quickly expand services for the target population(s).

Criteria:

- Agency indicates they have the capacity to begin providing expanded services by May 15, 2014.
- Staffing plans are already in place, or a plan has been described to quickly increase staffing capacity to carry out the proposed program plan.
- If additional time is needed, agency has provided a realistic, detailed timeline with a start date.

(6) Budget (10 out of 100 points)

Criteria:

- The budget forms are filled out completely and accurately.
- The budget is appropriate for the size and scope of the proposed program.
- If agency is proposing to subcontract, Attachment 4 has been completed.

V. PROPOSAL CHECKLIST

A complete proposal packet must include all of the following items:

1. A completed LOI Proposal Cover Sheet (Attachment 1)
2. Program Description Narrative
3. A completed Program Budget Summary (Attachment 2)
4. A completed Program Budget – Personnel Detail Form (Attachment 3).

Only for agencies proposing to subcontract: Your proposal should also include:

5. A completed Subcontracting Partner Budget Narrative (Attachment 4)

Incomplete proposal packets will be deemed unresponsive and will not be rated.

VI. PROPOSAL ATTACHMENTS

Attachment 1: Letter of Intent Proposal Cover Sheet

Attachment 2: Proposed Program Budget Summary

Attachment 3: Proposed Budget – Personnel Detail Form

Attachment 4: Subcontracting Partner – Budget Narrative

Attachment 5: BARS Classification of Expenditure Guidelines



City of Seattle
Human Services Department

Housing Stability Tenant Education

2014 Letter of Intent

Proposal Cover Sheet

| | |
|---|-----------------|
| 1. Agency: | |
| 2. Agency Executive Director: | |
| 3. Agency Primary Contact Name: Title: Address: Email: | |
| 4. Federal Tax ID or EIN: | 5. DUNS Number: |
| 6. WA Business License Number: | |
| 7. Does your proposal include subcontracting? <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| <p>Authorized signature of applicant / lead agency</p> <p><i>To the best of my knowledge and belief, all information in this application is true and correct. The document has been duly authorized by the governing body of the applicant who will comply with all contractual obligations if the proposal is awarded funding.</i></p> <p>Name and Title of Authorized Representative: _____</p> <p>Signature of Authorized Representative: _____</p> | |

ATTACHMENT 2

PROPOSED PROGRAM BUDGET SUMMARY

| | | | |
|--------------------------------|--|-------------------------|--|
| Agency Name: | | Project/Program: | |
| Person Completing Form: | | Phone Number: | |

| Item | Amount by Fund Source | | | | Total Project |
|---|--|--------------------|--------------------|--------------------|---------------|
| | HSD LOI Request | Other ¹ | Other ¹ | Other ¹ | |
| 1000 PERSONNEL SERVICES | AMOUNTS FOR THESE ITEMS ENTERED BY COMPLETING PERSONNEL DETAIL FORM | | | | |
| 1110 Salaries – Full- & Part-Time | | | | | \$0.00 |
| 1300 Fringe Benefits | | | | | \$0.00 |
| SUBTOTAL – PERSONNEL SERVICES | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 2000 SUPPLIES | | | | | |
| 2100 Office Supplies | | | | | \$0.00 |
| 2200 Operating Supplies ² | | | | | \$0.00 |
| 2300 Repairs & Maintenance Supplies | | | | | \$0.00 |
| SUBTOTAL - SUPPLIES | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| 3000 – 4000 OTHER SERVICES & CHARGES | | | | | |
| 3100 Expert & Consultation Services | | | | | \$0.00 |
| 3140 Contractual Employment | | | | | \$0.00 |
| 3150 Data Processing | | | | | \$0.00 |
| 3190 Other Professional Services ³ | | | | | \$0.00 |
| 3210 Telephone | | | | | \$0.00 |
| 3220 Postage | | | | | \$0.00 |
| 3300 Automobile Expense | | | | | \$0.00 |
| 3310 Convention & Travel | | | | | \$0.00 |
| 3400 Advertising | | | | | \$0.00 |
| 3500 Printing & Duplicating | | | | | \$0.00 |
| 3600 Insurance | | | | | \$0.00 |
| 3700 Public Utility Services | | | | | \$0.00 |
| 3800 Repairs & Maintenance | | | | | \$0.00 |
| 3900 Rentals – Buildings | | | | | \$0.00 |
| Rentals – Equipment | | | | | \$0.00 |
| 4210 Education Expenses | | | | | \$0.00 |
| 4290 Other Miscellaneous Expenses ⁴ | | | | | \$0.00 |
| 4999 Administrative/Indirect Costs ⁵ | | | | | \$0.00 |
| SUBTOTAL – OTHER SERVICES & CHARGES | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| TOTAL EXPENDITURES | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

| ¹ Identify specific funding sources included under "Other" above: | |
|--|--------|
| | |
| | |
| | |
| | |
| TOTAL | \$0.00 |

| ² Operating Supplies - Itemize below (Do Not Include Office Supplies): | |
|--|--------|
| | |
| | |
| | |
| | |
| TOTAL | \$0.00 |

| ³ Other Professional Services - Itemize below: | |
|---|--------|
| | |
| | |
| | |
| | |
| TOTAL | \$0.00 |

| ⁴ Other Miscellaneous Expenses - Itemize below: | |
|--|--------|
| | |
| | |
| | |
| | |
| TOTAL | \$0.00 |

| ⁵ Administrative / Indirect Costs – Itemized below: | |
|--|--------|
| | |
| | |
| | |
| | |
| TOTAL | \$0.00 |

| Complete this section |
|--|
| Does the agency have a federally approved indirect cost rate? If yes, provide the rate: _____ |

HSD implemented a policy in 2013 that places a fifteen percent (15%) cap on reimbursement for agency indirect costs, based on the total contract budget. The policy also requires that the proportion of indirect costs charged to a contract budget not exceed an agency’s federally approved indirect rate, as applicable. Other restrictions based on fund source requirements may also apply

ATTACHMENT 3

PROPOSED PROGRAM BUDGET SUMMARY – PERSONNEL DETAIL

| Agency Name | | | | Project/Program Name: | | | | |
|---|-------------|------|-----------------|-----------------------|---------------|---------------|---------------|---------------|
| Person Completing Form: | | | | Phone Number: | | | | |
| Full-Time Equivalent (FTE) = _____ Hours/Week | | | | Fund Sources | | | | |
| Position Title | Hourly Rate | FTEs | Number of Hours | HSD LOI Request | Other | Other | Other | Total Program |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| | | | | | | | | \$0.00 |
| Subtotal – Salaries & Wages | | | | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

| Personnel Benefits | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|
| FICA | | | | | \$0.00 |
| Pensions/Retirement | | | | | \$0.00 |
| Industrial Insurance | | | | | \$0.00 |
| Health/Dental | | | | | \$0.00 |
| Unemployment Compensation | | | | | \$0.00 |
| Subtotal – Personnel Benefits | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Total Personnel Costs (Salaries & Benefits) | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

ATTACHMENT 4

Subcontracting Partner – Budget Narrative

This form only needs to be completed by agencies including subcontracting in their program proposal.

| | |
|------------------------------------|--|
| Name of Subcontracted Agency: | |
| Subcontracted Agency Contact Name: | |
| Subcontracted Agency Email: | |
| Subcontracted Agency Phone: | |

1. Note specific line items and amounts from Attachments 2 *Proposed Program Budget Summary* that will be subcontracted:

Click here to enter text.

2. Note specific position titles and amounts from Attachment 3 *Proposed Program Budget Summary – Personnel Detail* that will be subcontracted:

Click here to enter text.

ATTACHMENT 5

BARS Classification of Expenditures Guidelines

| | |
|--|---|
| 1000 PERSONNEL SERVICES – Includes expenses for salaries, wages, and related employee benefits. | |
| 1100 | Salaries & Wages – Fees paid for personal services rendered. |
| 1110 | <u>Salaries (Full- & Part-Time)</u> – Salaries and wages paid for services rendered by full- & part-time employees. |
| 1190 | <u>Other Salaries & Wages</u> – Salaries and wages paid for services performed by work study, temporary and intermittent employees. |
| 1220 | <u>Overtime</u> – Fees paid in addition to regular salaries and wages for services performed in excess of regular work hour requirements. |
| 1300 | <u>Fringe Benefits</u> – FICA, Pensions & Retirement, Health Care, Dental, Unemployment Compensation, Industrial Insurance & Medical Aid. |
| 2000 SUPPLIES – Includes articles or commodities which are consumed. | |
| 2100 | <u>Office Supplies</u> – Supplies and materials that are to be used in the office. Examples: office stationery forms and small items of equipment (value under \$5,000, except computers and software). |
| 2200 | <u>Operating Supplies</u> – Supplies used to fulfill the needs of operations. |
| 2300 | <u>Repairs & Maintenance Supplies</u> – Supplies used in repair and maintenance. Examples: building materials & supplies, paints & painting supplies, plumbing supplies, motor vehicle repair & small tools. |
| 2500 | <u>Fuel Cost</u> – gas, diesel, heating. |
| 2600 | Minor Data Processing Items. |
| 2610 | <u>Personal Computer & Printers</u> – Value per item over \$1,000 and under \$5,000. |
| 2620 | <u>Software Purchases</u> – Under \$5,000 per item. |
| 3000 – 4000 OTHER SERVICES & CHARGES | |
| 3100 | <u>Expert & Consultant Services</u> – Services performed on a non-recurring basis. Examples: auditing services, accounting services, special legal services, and other individual and one-time services. |
| 3140 | <u>Contractual Employment</u> – Fees paid to individuals or businesses for temporary or short-term services. |
| 3150 | <u>Data Processing</u> – All data processing charges. |
| 3190 | <u>Other Professional Services</u> – Professional services not covered in the above classifications. Examples: Janitorial services, protective services, and other professional services. |
| 3210 | <u>Telephone</u> – Includes installation, long distance, directory service & local telephone service costs. |
| 3220 | <u>Postage</u> – Includes all meter postage, stamps, postal permits, etc. |
| 3290 | <u>Other Communications</u> – Includes Western Union costs. |
| 3300 | <u>Automobile Expense</u> – Includes lease and motor pool charges. |
| 3310 | <u>Convention & Travel</u> – Includes transportation, meals and lodging expenses incurred by the employee in the performance of official duties. A convention and travel authorization signed by your Executive Board must accompany any check paying convention and travel expenses. |
| 3320 | <u>Private Auto Allowance</u> – Includes lease and motor pool charges. |
| 3390 | <u>Other Transportation Expense</u> – Transportation expenses not covered in the above classifications. |
| 3400 | <u>Advertising</u> – Includes cost of advertising, publication of public notices, and other such items. |
| 3500 | <u>Printing & Duplicating</u> – Includes printing, duplicating and/or binding of books, pamphlets, newsletters and other reading materials. |

| | |
|------|---|
| 3600 | <u>Insurance</u> – Includes all insurance premiums except what is applicable to Personnel Services. |
| 3700 | <u>Public Utility Services</u> – Includes Washington Natural Gas, City Light, Water, Garbage, Sewer and Puget Power. |
| 3800 | <u>Repairs & Maintenance</u> – Includes all services required in the maintenance of all equipment, machinery, buildings and improvements. |
| 3900 | <u>Rentals</u> – This classification should include all types of rentals. Examples: <i>Rental of office equipment, land, buildings, movie rental fees, and machinery and equipment rental charges.</i> |
| 4210 | <u>Education Expense</u> – Includes tuition, travel and living expenses of employees sent to educational programs or schools. |
| 4290 | Direct Client Assistance. |