



Taos Community Foundation

115 La Posta, Ste A
Taos, NM 87571

**Request for Proposals:
Law Enforcement Assisted Diversion (LEAD) Services**

RFP # 2022-1

PROPOSALS DUE:
January 24, 2022
5:00 p.m. MST

Email: taoslead@gmail.com

**RFP #2022-1
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November 8, 2021

Dear Community Providers,

This year Taos received funding from the New Mexico State Behavioral Health Services Division (BHSD) Comprehensive Opioid, Stimulant, and Substance Abuse Program (COSSAP) grant through the Department of Justice (DOJ) to implement a Law Enforcement Assisted Diversion (LEAD) Program. LEAD is a community program in which law enforcement officers may divert individuals involved in low-level, non-violent crimes into intensive case management instead of arrest and prosecution. The Taos Community Foundation is the fiscal agent for this grant. As the Taos Community Foundation (TCF) Director, it is exciting to request a service agency to provide intensive case management for the Taos LEAD program. COVID has stretched all of our agencies meanwhile, substance use, mental illness, and crime continue to rise. Our community is asking for new methods to end the cycle of drug addiction in individuals and families. With these funding resources, we can implement an evidence-based method to reduce crime, improve public safety, and enhance comprehensive services in our community. I sincerely appreciate your efforts and look forward to receiving your proposal for intensive case management services. The term of this grant is January 2022 through September 30, 2023 with possible extensions.

The purpose of this letter is to inform you of the process for submitting the Request for Proposal (RFP) packet for a contract to provide LEAD case management services. All agencies requesting TCF funding for the grant period 2021-2023 must review and comply with all requirements of the RFP packet. Any requirements not complied with could delay or disqualify your agency from funding consideration. Failure to submit the required information may affect the overall rating criteria. **Submit an electronic proposal with all submittal requirements to taoslead@gmail.com.**

You may receive a copy of this RFP at the above email or at the TCF website, taoscf.org anytime beginning November 23, 2021. If you have any questions or need assistance with the RFP packet, please contact Rasa O'Donnell, Taos LEAD Program Manager, at 505-315-8336 or me at 575-737-9300.

Thank you,

A handwritten signature in black ink, appearing to read 'Helen Forte', written over a light blue horizontal line.

**Helen Forte, Director of Community Impact
Taos Community Foundation**

REQUEST FOR PROPOSALS

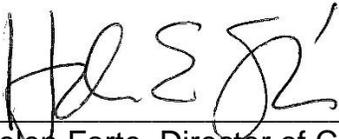
PROPOSAL NUMBER #2022-

1

Proposals will be received by the Taos LEAD program manager at the email address taoslead@gmail.com until 3:00 p.m. MST, December 23, 2021. Any proposal received after this deadline will not be considered. This proposal is for the purpose of procurement of services for the following:

**Law Enforcement Assisted Diversion LEAD Program
Services**

The respondent's attention is directed to the fact that all applicable Federal Laws, State Laws, Municipal Ordinances, and the rules and regulations of all authorities having jurisdiction over said item shall apply to the proposal throughout, and they will be deemed to be included in the proposal document the same as though herein written out in full.



Helen Forte, Director of Community Impact

Received by the Taos News on: 11/23/21 to be published on: 12/02/21

PROPOSAL SCHEDULE

RFP # 2022-1

1. Advertisement: November 23, 2021
2. Issuance of RFP'S: November 23, 2021
3. Program Discussion with Questions And Answers (Applicants are strongly Encouraged to Participate) November 30, 2021
2:00 pm to 3:00 pm
Zoom link: <https://us02web.zoom.us/j/7308160949>
4. Receipt of proposals: December 23, 2021
3:00 p.m. local prevailing time.
5. Evaluation of proposals: Jan 3, 2021 – January 7, 2022
6. Recommendation of award to Finance Committee: January 7, 2022
7. Announcement of award to Recipient: January 10, 2022

DATES FOR CONSIDERATION BY THE TAOS COMMUNITY FOUNDATION ARE TENTATIVE AND SUBJECT TO CHANGE WITHOUT NOTICE.

INFORMATION FOR PROPONENTS

1. RECEIPT OF PROPOSALS

The Taos Community Foundation (herein called "TCF"), invites organizations to submit one electronic copy of the proposal. Proposals will be submitted to the program manager, Rasa O'Donnell at taoslead@gmail.com until **3:00 p.m.** MST, on December 23, 2021.

No late proposals will be accepted. Any proposal received after the time and date specified shall not be considered.

2. PREPARATION OF PROPOSALS

Proponents shall comply with all instructions and provide all the information requested. Failure to do so may disqualify your proposal. All information shall be included in the electronic submission.

This request for proposal may be canceled or any and all proposals may be rejected in whole or in part whenever the TCF determines it is in the best interest of the program.

3. ADDENDA AND INTERPRETATIONS

No oral interpretation of the meaning of any section of the proposal documents will be binding. Oral communications are permitted in order to make an assessment of the need for an addendum. Any questions concerning the proposal must be addressed prior to the date set for receipt of proposal.

Every request for such interpretations should be in writing to Rasa O'Donnell, Taos LEAD Program Manager, taoslead@gmail.com, and to be given consideration must be received at least five (5) days prior to the date fixed for the receiving of proposals. There will be a Q and A on November 30th to answer questions.

Any and all such interpretations and any supplemental instructions will be in the form of written addenda to the RFP, which if issued, will be emailed to all prospective applicants not later than three days prior to the date fixed for the receipt of the proposals. Failure of any proposing applicant to receive any such addenda or interpretation shall not relieve such applicant from any obligation under their proposal as submitted. All addenda so issued shall become part of the contract documents.

4. LAWS AND REGULATIONS

The proposing organization's attention is directed to the fact that all applicable Federal laws, State laws, Municipal Ordinances, and the rules and regulations of all authorities having jurisdiction over said item shall apply to the contract throughout. They will be deemed to be included in the contract the same as though herein written out in full.

Compliance with all applicable requirements of the 2 Code of Federal Regulations (C.F.R) Part 200 Uniform Requirements are expected. These requirements include,

among other things, requirements regarding financial management, internal controls, cost principles, allowable costs, indirect costs, and records retention and access.

Records must be retained for a minimum of 3 years. Organization must report duplicative funding. Organization hires must verify employment eligibility using E-verify (www.e-verify.gov). Protect client identifying information and follow procedure for a breach. Follow all other federal requirements.

5. METHOD OF AWARD

Awards are based on qualified proposals as per the enclosed rating system and at the discretion and consideration of the governing body of the Taos LEAD Policy Coordinating Committee. The selection committee may interview any proponent; however, contracts may be awarded without such interviews. At its discretion, the LEAD Policy Coordinating Committee reserves the right to alter the membership or size of the selection committee, and to change the number of proponents interviewed.

6. PROTESTS AND RESOLUTIONS PROCEDURES

Any proponent, offeror, or contractor who is aggrieved in connection with procurement may protest to the LEAD Program Manager. The protest must be in writing and submitted within fifteen (15) days and requirements regarding protest and resolution of protests are available from the LEAD Program Manager upon request.

SPECIAL CONDITIONS

1. GENERAL

The Taos Community Foundation will create a binding contract with the chosen service provider agency. TCF will allocate up to \$303,000 until September 30th, 2023 to the provider agency.

2. ASSIGNMENT

Neither the contract, nor any interest therein, nor claim under, shall be assigned or transferred by the contractor except as expressly authorized in writing by the TCF office. No such consent shall relieve the contractor from its obligations and liabilities under contract.

3. VARIATION IN SCOPE OF WORK

No increase in the scope of work or services will be accepted, unless means were provided or specified within the contract documents. Increases or decreases in the scope of work can be made upon request by TCF or unless such variation has been caused by documented conditions beyond the contractor's control, and then only to the extent of any, specified elsewhere in this document.

4. TAXES

The contract amount shall include all taxes applicable. TCF is exempt from paying gross receipts tax. A tax exempt certificate will be issued upon written request.

5. INVOICING

(A) The reimbursement request form shall be submitted and documented and shall contain the following information: Quantities, unit prices and extended totals. Separate invoices shall be rendered for each and every complete billing.

(B) Reimbursement requests must be submitted to the LEAD Program Manager, not TCF.

6. METHOD OF PAYMENT

Every effort will be made to process payments within 30 days of receipt of a detailed invoice and proof of delivery and acceptance of the products or services hereby contracted or as otherwise specified in the compensation portion of the contract documents. The LEAD Program Manager shall be the final determination of satisfactory receipt of goods or services.

7. DEFAULT

TCF reserves the right to cancel all or any part of this order without cost to TCF if the vendor fails to meet the provisions for this order, and except as otherwise provided herein, to hold the vendor liable for any excess cost occasioned by TCF due to the contractor's default. The contractor shall not be liable for any excess cost if failure to perform the order arises out of causes beyond the control and without the fault or negligence of the contractor and these causes have been made known to the Program Manager in written form within

five working days of the vendor becoming aware of a cause which may create any delay; such causes include, but are not limited to, acts of God or the public enemy, acts of the State or of the Federal Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather and defaults of sub-contractors due to any of the above unless the Program Manager shall determine that the suppliers or services to be furnished by the sub-contractor are obtainable from other sources in sufficient time to permit the contractor to meet the required delivery schedule. The rights and remedies of TCF are not limited to those provided for in this paragraph and are in addition to any other rights provided for by law.

8. NON-DISCRIMINATION

By signing this Taos Community Foundation bid or proposal, the contractor agrees to comply with the Presidents Executive Order No. 11246 as amended.

9. NON-COLLUSION

In signing this bid or proposal, the contractor certifies they have not, either directly or indirectly, entered into action in restraint of full competition in connection with this bid or proposal submittal to the Taos Community Foundation.

10. REPORTING REQUIREMENTS

Four (4) Quarterly Reports and one (1) Final Project Report assessing fiscal and programmatic goals and objectives will be required for submittal to the Program Manager.

11. AUDIT REQUIREMENTS

Proponents are subject to the audit requirements set out in the Part 200 Uniform Requirements (at Subpart F of 2 C.F.R. Part 200), or to related requirements set out in award conditions.

12. SEXUAL CONDUCT

In signing this proposal the proponent certifies that it does not discriminate on the basis of gender or sexual orientation. The proponent further certifies that a written policy outlines all consequences for any type of sexual harassment, regardless of gender or sexual orientation.

REQUIREMENTS FOR SUBMITTAL

The following materials must be submitted in the sequence listed below as a part of the proposal. Do not assume that this material is available to reviewers elsewhere. Enclose or attach all documents requested below to the submission. In the event that agencies do not possess the requested documents, proponents must consult with the LEAD Program Manager prior to submitting a proposal.

1. Copy of all applicable licenses (current), including a copy of 2021 Business Registration Certificate for the Town of Taos; Diagnostic and Treatment Center Operator's License; DEA Certificate; New Mexico Board of Pharmacy, Residential Treatment, Adult Day Care Facility and Outpatient Medical Treatment Facility Licensure if applicable. (Do not include copies of staff licenses). If not applicable please provide a brief explanation.
2. Copy of current general liability insurance certifications or binders naming the TCF as co-insured in accordance with the New Mexico Tort Claims Act. (At least one million dollars.) Worker's Compensation and Professional Liability insurance if applicable.
3. Current list of the names, addresses and phone numbers of current Board members, officers, committees identified, terms of office, occupation and ethnicity.
4. Copy of New Mexico Incorporation Charter or agreement under which your agency operates.
5. Copy of EEO and ADA Certification.
6. Copy of IRS Certificate for non-profit status, if applicable.
7. Non-Collusion Affidavit (must be notarized).
8. Copy of Church/State Separation Certification.
9. Consolidated Income Statement with current month and year-to-date.

For uniformity in the proposal review process, please sequence your proposal in the above format. Proposals must address all items #1 through #9. Those proposals not adequately addressing the submittal requirements may be considered non-responsive and may be excluded from the application process. **Include these materials as attachments to the end of your proposal.**

EEO/ADA CERTIFICATION

ASSURANCE OF COMPLIANCE WITH TITLE VI AND VII
OF THE CIVIL RIGHTS ACT OF 1964
AND
AMERICANS WITH DISABILITIES ACT OF 1990

(hereinafter called the "Applicant")
Name of Applicant)

HEREBY AGREES THAT it will comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352) and all requirements imposed by or pursuant to the Regulations of Taos Community Foundation issued pursuant to that title, to the end that, in accordance with Title VI of that Act and the Regulations, no person shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant receives city or federal financial assistance from the Taos Community Foundation; and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.

Applicant hereby certifies that it offers Equal Employment Opportunity and complies with Title VII of the Civil Rights Act of 1964 as amended by the Equal Employment Opportunity Act of 1972 and all requirements imposed by or pursuant to Regulations of the Taos Community Foundation issued pursuant to that title expressly prohibiting discrimination in employment on the basis of race, color, religion, sex or national origin. Application HEREBY GIVES ASSURANCE THAT it will take any measures necessary to effectuate this agreement.

The Applicant hereby warrants he/she is in compliance with the Americans with Disabilities Act, 29 CFR 1630.

Dated: _____

(Applicant)

By: _____
(President, Chairman of Board, or
comparable authorized official)

(Applicant's mailing address)

NON-COLLUSION AFFIDAVIT OF PROPONENT

State of)
)
County of)

being first duly sworn, deposes and says that:

(1) She/He is the__ of__ , the proponent that has submitted the attached Proposal;

(2) She/He is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Proposal;

(3) Such Proposal is genuine and is not a collusive or sham Proposal;

(4) Neither the said proponent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Proponent, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner directly or indirectly, sought by agreement or collusion or communications or conference with any other Proponent, firm or person to fix the price or prices in the attached Proposal or of any other Proponent, or to fix any overhead, profit or cost element of the Proposal price or the Proposal price of any other Proponent, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Taos Community Foundation, or any person interested in the proposed Contract; and

(5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the proponent or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

(SIGNED)
(TITLE)

Subscribed and sworn to before me this_____day of_____, 2021.

Notary Public

My Commission Expires: _____

CHURCH/STATE SEPARATION CERTIFICATION FORM
Certification by non-profit agency(s)

I, _____, Board Chairman of _____, make the following assurances and certifications:

(A) The Agency hereby certifies that it will comply with the following separation of Church and State requirements:

The agency agrees that:

- (a) it will not discriminate against any employee or applicant for employment on the basis of religion and will not limit employment or give preference in employment to persons on the basis of religion;
- (b) it will not discriminate against any persons seeking services on the basis of religion and will not limit such services or give preference to persons on the basis of religion;
- (c) it will require no religious instruction or counseling, conduct no religious worship or services, engage in no religious proselytizing, and exert no other religious influence in the provision of services or the use of facilities or furnishings assisted in any way under this agreement; and
- (d) the facility under this agreement or in which services are provided which are assisted under this agreement shall contain no sectarian or religious symbols or decorations.

(B) I agree to carry out Taos Community Foundation Grant Program activities in accordance with applicable laws and regulations.

Signature of Board Chairman

Date

GENERAL INSTRUCTIONS FOR FUNDING

Taos Community Foundation Statement of Purpose

Taos Community Foundation is a non-profit, community corporation created by and for the people of Taos and western Colfax counties that builds on the vision of making a difference in community for today and tomorrow. TCF is the fiscal agent for the DOJ grant awarded to support the Taos LEAD program. It seeks to contract with a behavioral health agency to provide intensive case management for LEAD participants.

LEAD Funding

Taos Community Foundation is soliciting requests from interested parties to serve as the primary service-provider/intensive case management for the diversion component of the Taos Law Enforcement Assisted Diversion (LEAD) program. Applications for funding must comply with the Policy Coordinating Committee/Implementation Team recommendations and values.

TCF allocated funds for coordination and provision of direct services to adults who meet the criteria to be diverted from incarceration due to drug or alcohol use. It is imperative that the selected provider participates in the training and information sharing systems with law enforcement to ensure the success of the LEAD program.

The principal service provider for this project will serve as the initial and/or primary point of contact for diverted individuals and will assume responsibility for providing intensive case management, and either providing or procuring other necessary services for those individuals. Although each client will have different needs the following service package must be available (per recommendations from the LEAD Policy Coordinating Committee):

- Enrollment/Assessment
 - Screening and psychosocial intake
 - Individualized care plan, including goal setting and treatment planning
 - Outreach and engagement
- Basic Needs
 - Assistance in applying for services including entitlement and housing programs
 - Assistance in accessing shelters, short-term motel stays, food programs
 - Assistance with basic needs including hygiene items, food, and clothing
 - Medicaid enrollment or coordination with other health exchange programs or health plans (e.g., Veterans Administration, private health insurance plans)
 - Support in accessing medical and dental services
 - Assistance obtaining transportation, including but not limited to, bus

- vouchers
- Harm Reduction
 - Access to Naloxone, syringe exchange, overdose prevention, and harm reduction education
- Housing
 - Assistance in accessing emergency, transitional and permanent housing
- Treatment Services
 - Medication Assisted Treatment (MAT) such as buprenorphine
 - Facilitation of admission to addiction and mental health treatment programs including in-patient, out-patient, and detox services
 - Addiction and mental health recovery support
- Education/Job Training/Employment
 - Assist participants in accessing education, job training and employment resources
- Legal Concerns
 - Attending court appearances
 - Advocacy with courts, Department of Corrections, Probation
 - Financial assistance and payment of fines
 - Support in facilitating completion of community service
 - Assistance with child welfare system

Key components of the intervention model are: intensive case management, peer outreach and counseling, individual intervention plans, comprehensive services (purchased on the private market where necessary to avoid waiting lists) including housing, treatment, education, job development and stipends, within a harm reduction framework.

The current project timeline calls for LEAD to begin officer and service provider trainings and trial operations in January 2022. The trial period will consist of pre-implementation fidelity testing (ensuring proper adherence to the model), and clarification of protocols. The full start-up is scheduled for February 2022. Following this, there will be 19 months of project operations to September 2023 and ongoing depending on funding.

Applicants should familiarize themselves with the core principles and ideas underlying the LEAD Project (p.17). A LEAD Operational Workgroup of various program stakeholders will hold staffing sessions to review referral decisions and program participant progress. This will be discussed in greater detail in the LEAD protocols. Protocols are still in draft form.

The instructions and forms contained within this packet are meant to simplify the process and provide ample opportunity for proponents to present a case to describe the development and implementation of the LEAD program. The proposals submitted to the Taos Community Foundation will be reviewed by the LEAD program manager and TCF staff for compliance with requirements. Those proposals that meet all requirements will be reviewed by a selected review team who are part of the Policy Coordinating Committee and awarded according to TCF

procurement processes.

The text of the proposal should be typed on the forms and in the format provided within this packet. The narrative should provide a summary statement that is complete in and of itself. Additional materials such as support letters are not necessary. If a proponent wishes to include supplemental materials, they may be included in an appendix to the proposal.

Proponents are recommended to have a two-year history of successful operation and experience providing intensive case management services to individuals with behavioral health issues. TCF will fund government or nonprofit organizations that meet the federal criteria (which can be provided upon request) and must have a physical location operating within the Town of Taos and/or County of Taos currently serving Taos residents.

The following pages outline the criteria for funding. Funding is intended to pay for intensive case management rather than administrative costs and agencies are urged to submit applications which reflect this in their budgets. Administrative costs will be considered on a case by case basis.

LEAD Project Overview

LEAD is a pre-booking diversion program with client eligibility criteria established by the LEAD Policy Coordinating Committee. The principal service provider for this project will serve as the initial and/or primary point of contact for diverted individuals and will assume responsibility for either providing or procuring services for those individuals.

Following established guidelines, at the point of arrest for qualifying offenses, officers will offer diversion to individuals. Individuals accepting diversion will be diverted to project case managers. Case managers will then conduct an intake assessment. Working with clients, case managers will triage the range of services needed. This triage is to be client-centered and driven. Case managers must be familiar with harm reduction philosophy and should be proficient with techniques such as motivational interviewing.

Once the range of services needed are identified and prioritized, case managers will work on procuring services. To the extent possible, we are striving for services on demand. There also are no pre-established or firm guidelines for what constitutes program completion. The Operational Workgroup will have the power to terminate participants from services based on criteria that are still being developed. The goal is to maintain participants in services until they are capable and prepared to transition out.

It is important to note that case management for LEAD is somewhat different than it is sometimes practiced. Our expectation is that a LEAD case manager will use the financial resources available through the project to work extensively and intensively with participants. The contract includes a Wellness Fund to utilize for client needs (p.27). Based on evaluations of similar programs in New Mexico, it is anticipated that the extent of participant needs will range from minimal (one to two meetings with little to no services) to extensive (lengthy

provision of intensive case management with a wide range of services.) LEAD Case Managers must be willing and able to work with high needs participants for prolonged periods of time. Intensive case management services may be expected to be provided on a flexible basis; LEAD clients may require services after-hours and on weekends.

In addition, case managers will work with partners to seek all sources of funding for the individuals requirements. This will include Medicaid. In fact, the primary service provider must have a system in place to actively enroll LEAD clients into Medicaid, if they are not already enrolled.

Core principles of LEAD Case Management:

- **Intensive case management.** Participants engaged in problematic drug use require a more holistic approach to case management. They not only need access to MAT and other drug treatment options, they need access to food, housing, legal advocacy, job training, etc. Overall they need increased support in accessing these services. Intensive case management provides increased support and assistance in all aspects of the participant's life
- **Peer outreach and counseling.** There is substantial evidence that highly marginalized populations can be engaged by peers whom the potential participants view as knowledgeable about their situation and as credible reporters about the value of a program. Ongoing peer counseling provides support for behavioral changes that are achieved initially through investment of memory and program staff time.
- **A harm reduction philosophy.** Participants will be engaged where they are; they will not be penalized or denied services if they do not achieve abstinence. The goal is to reduce as much as possible the harm done to themselves and to the surrounding community through problematic drug activity. Again, some or all services may be withdrawn from participants whom LEAD staff feel are not making progress toward reducing the harm caused by their behavior.
- **Community transparency and accountability.** It is essential that community stakeholders and public safety leaders be able to participate in regular staffing meetings, have access to program performance reports, and have excellent access to program staff to suggest areas where outreach could usefully be concentrated. Community confidence that pre-booking diversion is a reasonable way to accomplish the goal of improving public safety is essential to the viability of the program

LEAD FUNDING

Mission Statement

LEAD is dedicated to protecting our children and families, protecting public safety, and improving public health. Our mission is to reduce the number of low-level drug offenders entering the criminal justice system, allowing public safety resources to be redirected to address serious and violent crime, and to improve individual and community quality of life through research-based, public health-oriented interventions.

Criteria for LEAD Funding Consideration

To qualify for funding, proponents must satisfy all of the following criteria and respond fully to each item in the proposal instructions. This funding is intended to benefit Taos County residents.

Section 1: Background

Provide an overview of your agency. Include mission and approaches to service provision, and existing services provided by the agency.

Section 2: Principles

Adhere to the core values of the LEAD project, outlined in the core principles of LEAD case management (p.16) including but not limited to, intensive case management, harm reduction, and outcome-driven system of care.

1. Harm reduction is one of the core principles of the LEAD model and service-providers working within the LEAD framework must be prepared to employ a harm reduction approach.
 - Please describe your agency's understanding of harm reduction.
 - Do you practice harm reduction in any of your current programs? If so, please describe concretely how you practice it and for what populations?
 - Does your agency have a commitment to harm reduction? If so, how is it expressed? If not, why? Are you prepared to develop and implement a plan to incorporate one as far as this project is concerned?
2. One of the core principles of LEAD is the provision of culturally competent services.
 - Describe previous experience with providing services to diverse populations and describe organization's capability for providing culturally competent services to the specific racial, ethnic, and cultural consumer groups who will be served by LEAD.
 - Describe the size, mix, training, experience, and demographics of proposed staff

and describe how staff will reflect the ethnicity and languages of the target population.

3. Part of the service delivery model for the LEAD project relies on peer outreach and counseling.
 - Describe your agency's understanding of peer outreach and counseling.
 - Do you employ/use peer educators, outreach workers, or certified peer support workers in any of your current programs? If so, please describe concretely how you use them and for what populations. (If you do not currently use peers but have in the past, please answer based on that experience.)
 - If you do not have experience with peer education, how will you develop the capacity to do so?
4. LEAD is committed to the success of its participants. What is your experience with and commitment to an outcome-driven system of care? Have you participated in any programs where you were evaluated based on the outcomes of your clients? If yes, please describe.

Section 3: Experience

5. Describe with whom and how you coordinate services with other agencies in the community and where does it need to be strengthened. Indicate which coalitions and other associations in which you participate.
 - Please describe your experience working collaboratively with other agencies and at leveraging other resources.
 - Do you anticipate subcontracting for delivery of services, such as: intensive case management, medication assisted treatment, job preparation, transitional housing or outreach? If so, please name the agency(ies), describe their expertise and describe your previous experience with subcontracting.
6. This project will entail intensive and possibly long-term case management of individuals who are engaged in street-level illegal activities, many of whom will be chemically dependent and/or presenting with mental health issues.
 - Please describe your agency's experience working with substance using populations (including those engaged in delivery of illegal substances).
 - Please describe your agency's experience in providing intensive case management services.

- Please describe your agency's experience working with individuals with mental health problems.
7. Please describe your experience working with individuals who have experienced trauma such as: violence, domestic violence, sexual assault, developmental trauma or historic trauma.
 8. Are you familiar with programs working with pregnant women and can you establish linkages with them? Please describe.
 9. Describe your experience working with law enforcement agencies and personnel.
 10. Describe your experience enrolling individuals into Medicaid and with the reimbursement process.
 11. Describe your experience with providing services at flexible hours, including nighttime and weekend shifts.
 12. Describe your knowledge of the population(s) involved with drug addiction.

Section 4: Procedures and Finances

13. Please describe what assistance you foresee needing from TCF or the Policy Coordinating Committee with regard to hiring staff, housing, treatment, employment, and/or legal resources, and any other program requirements.
14. This project will entail substantial data collection.
 - Describe what methods are used to measure the effect the agency's services have on the clients served. Include data collection, measurable outcomes and relationship to program goals.
 - Describe your experience with collecting client-level data (please provide concrete examples).
 - Describe your experience in utilizing existing city, county, state, and federal reporting and data systems.
15. Explain how consumer/client and feedback is incorporated into the agency's service delivery system.
16. Describe the involvement of whole families or other positive support systems in the solution to a problem rather than work with individuals only.
17. This project will entail implementing an established intervention and following

established protocols

- Please describe any prior experience your agency has in implementing such programs.

18. Describe experience tracking financial and cost data related to services by individuals provided by the organization and other partners.

INSTRUCTIONS FOR PROPOSAL COMPLETION

SIGNATURE SHEET

The signature sheet summarizes essential information for immediate review (p25). Please complete as requested. Original signatures of both the Executive Director and Board President or other authorized officer of the board are required. **This is the front sheet of your proposal.**

PROPOSAL NARRATIVE

Provide an overview of your agency, including information about your organization's services and service systems, conceptual approaches to service provision and capacity. Address all criteria mentioned above. The Committee will review your proposal for completeness and response to each section. Limit your responses to no more than 10 pages using Times New Roman size 12 font.

FUNDING BUDGET

The Taos Community Foundation will allocate up to \$303,000 for the grant term which is from the date of the award announcement to September 30, 2023. Funds can support:

- 1) LEAD Case managers: up to 2 FTE case manager staff, preferably Certified Peer Support Workers (CPSW) or individuals working towards their certification, at a rate of at least \$18/hour plus benefits
- 2) One clinical supervisor: up to .25FTE
- 3) Program supplies including laptop or tablet, hot spots, cell phones for case managers
- 4) Staff training and professional development
- 5) Wellness Funds for client needs. Please see the Wellness Fund Allowable Expenses in Appendix A.

Attach a budget narrative (See Form on page 26) of no more than two pages describing details of expenditures as appropriate. The Taos Community Foundation provides funding through a reimbursement basis. Therefore the provider must have the ability to cover costs expended before requesting funding from TCF.

Funding for LEAD will be provided through a federal grant issued by the state Behavioral Health Services Division (BHSD). The Taos Community Foundation allocates funds for all program services and expenses. Further funding for services including federal, state, and private sources will be explored for the continuation of the program in 2023.

Please include a copy of your most recent independent audit (or, in lieu of that, most recent 990) with your application.

ORGANIZATIONAL STRUCTURE

Attach a copy of your agency's current functional organizational chart. This chart should include

reporting relationships and should list all staff positions.

PROPOSAL EVALUATION PROCESS

All proposals will be evaluated by the staff of the Taos Community Foundation. A summary of both organization and proposal strengths and weaknesses will be forwarded to the Taos LEAD Policy Coordinating Committee, respectively, with proposal narrative materials. Actual funding recommendations to the Taos Community Foundation are made by the members of the Taos LEAD Policy Coordinating Committee.

The following items will be examined:

- program "fit" with core principles (refer to page 16)
- degree to which proposal meets LEAD Funding criteria (refer to pages 17-20)
- adherence to RFP requirements and completeness of proposal package
- proposed scope of services, including number of service categories and intensity of activity
- assessment of sponsoring organization's ability to successfully carry out proposed program activities, including examination of staff qualifications, organizational structure; and board make-up
- general assessment of sponsoring organization's fiscal and administrative capability.

Each item is worth five (5) points maximum. A perfect score will be 30 points. See the Evaluation Criteria on the following page.

EVALUATION CRITERIA

Proponent Program:	
Contact Person:	
Reviewer:	
Date:	

Please circle one number corresponding to the responsiveness of the proposed contractor; with one being the lowest or no response and five being the highest or best response.

Priority Services: (Circle One)

1 2 3 4 5 Agency/program addresses core principles..

Comments:

Funding Criteria: (Circle One)

1 2 3 4 5 Agency/program meets required criteria and submittals as stated in the RFP.

Comments:

Proposal Completeness: (Circle One)

1 2 3 4 5 Proposal for funding adheres to RFP requirements and is substantially complete.

Comments:

Scope of Activity: (Circle One)

1 2 3 4 5 Organization will provide appropriate number of services

Comments:

Program Capability: (Circle One)

1 2 3 4 5 Organization has qualified staff and appropriate organizational structure to meet program requirements.

Comments:

Fiscal and Administrative Capability: (Circle One)

1 2 3 4 5 Agency has proper fiscal systems and active Board of Directors to carry out program mandates.

Comments:

TOTAL POINTS EARNED:	
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Taos Community Foundation Signature Sheet
Funding Applications for LEAD Funds

Name of Applicant Agency:	
Address of Applicant Agency:	
Name of Contact Person:	
Telephone Number and E-mail Address of Contact Person:	
Brief Project Description:	
Amount of Funds Requested from TCF:	\$
Approval: _____ Signature of Board President	Date
Submission: _____ Signature of Executive Director	Date

BUDGET NARRATIVE SHEET

Itemize each entry by line-item code, description and amount. Indicate if salary is gross or net, part-time or full-time (specify by FTE, e.g., .50, .75, 1.0).

Appendix A

Protocol for Use of Wellness Funds

The LEAD Wellness Fund is used to respond to a client's crisis involving housing, transportation, utilities, access to food, clothing, hygiene products or personal safety, and activities related to achieving goals in their Individualized Care Plan. Other uses may be allowed by prior written approval from the LEAD Program Manager.

When using LEAD Wellness Funds, Case Managers are encouraged to exercise discretion and be innovative. Any LEAD client is eligible to receive Wellness Funds. There is no limit on the number of items, frequency, or amount of Funds that a client may receive.

The Case Manager may obtain an item with LEAD Wellness Funds and give it to the client, or accompany the client and pay for an item using these Funds, but cannot give money from this Fund to the client to pay for an item.

If the Case Manager wants to use LEAD Wellness Funds for any purpose not specified in this protocol, they must obtain prior approval from the LEAD Program Manager. Wellness Funds should not be used to pay for uses that arise from needs that require ongoing funding, such as childcare.

Case Managers must log the client's name, item, date, amount spent and attach the receipts for the expenditure on each invoice using the Expenditure Log Template (available by request). An excel version can be provided if needed. To protect the identity of the client, the Expenditure Log will not be submitted with the invoice for payment. Only the invoice and receipts will be submitted for payment. The Expenditure Log is to be used by the LEAD Program Manager to track costs and to understand client needs for future budgeting purposes.

If you have any questions regarding this protocol, contact the LEAD Program Manager (505-315-8333)

