



Request for Proposal (RFP) Announcement

For: Self-Directed Supports and Integrated Employment Innovation Project

**Issued by:
The Wisconsin Board for People with Developmental Disabilities**

**Proposals must be submitted
no later than 5:00PM CT
Monday, February 20, 2012**

**For further information regarding this
RFP contact Ann Sievert at (608) 267-9897 or ann.sievert@wisconsin.gov**

LATE PROPOSALS WILL NOT BE ACCEPTED

Proposal Schedule of Events and Timeline

Activity/Event	Date
RFP released	Wednesday, January 11, 2012
Questions submitted	Friday, January 27, 2012
Due date for applications	Monday, February 20, 2012
Review process complete/applications ranked	Friday, March 2, 2012
Rankings posted in office and on website	Monday, March 5, 2012
Notice of award	Monday, March 5, 2012
Contract complete by BPDD	Friday, March 9, 2012
Contract signed and submitted to BPDD	Monday, March 19, 2012
Start date of contract	Monday, April 2, 2012

Request for Proposal (RFP): Self-Directed Supports and Integrated Employment Innovation Project

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REQUEST FOR PROPOSALS

Self-Directed Supports and Integrated Employment Innovation Project

Section 1: Project Overview

1. Background:

The Wisconsin Board for People with Developmental Disabilities (BPDD) serves as an advocacy and planning body to influence the direction of programs and policies for individuals with developmental disabilities in the state. BPDD is dedicated to improving the independence, productivity, and integration of people with developmental disabilities. Independence means having choices available, being able to choose, and exercising control over one's own life. Productivity means making a contribution to one's own household, neighborhood and community. It means working in the community and earning a living. Integration means being present in the community, participating in the life of the community and being valued as a person, friend, family member and neighbor.

The major tasks for the Wisconsin BPDD outlined in federal and state law include planning and overseeing the state's responses to the needs of people with developmental disabilities, and acting as an advocate to insure the provision of adequate, appropriate, and humane services. BPDD also supports self-determination for people with developmental disabilities, including advocacy for basic community services, such as health care, housing, transportation, education (including transition), and meaningful work opportunities.

Every five years, BPDD submits a plan to the federal government that focuses on systems change that will improve the quality of life for people with developmental disabilities in the state. The current state plan began October 1, 2011 and ends September 30, 2016. After extensive public input, the following priority goals were identified for the current state plan:

Goal 1 (Self-Directed Supports): People with developmental disabilities of all ages make choices about their lives, and are actively engaged in planning their services and supports.

Goal 2 (Employment): People with developmental disabilities will be employed in integrated jobs of their choosing in the community.

Goal 3 (Self-Advocacy): People with developmental disabilities and their families will be effective advocates and leaders resulting in systems change on issues they feel are most important to them.

This request for proposal focuses on both Goal #1 (Self-Directed Supports) and Goal #2 (Employment), however, primarily targeting Goal #2. The specific objective for Goal # 2 is to double the number of people participating in long term care who are in integrated jobs in the community by 2016.

2. Need and Purpose:

Employment is a necessary activity for all adults, including people with developmental disabilities, to be able to live in the community. Work is not only necessary for economic self-sufficiency, it also is a means to contribute to the economy, to develop relationships, and build a sense of citizenship. Unfortunately Wisconsin is lagging behind many states in terms of the number of people with disabilities engaged in integrated employment, and wages earned. Many people with developmental

disabilities are under-employed or unemployed. 2009-2010 data indicate that only 12.5% of working age people with disabilities served by Wisconsin's long-term care system are working in integrated jobs. Over 87% are unemployed or working in segregated jobs that are not stable, offer few if any benefits, and typically pay much less than minimum wage.

Wisconsin, however, has been a leader in implementing the principles and practices of Self-Determination and Self-Directed Supports (i.e., SDS) in its long-term care system. Over 10,000 people with disabilities participate in self-directed supports either through a managed care program or Wisconsin's Self-Directed Supports option (i.e., IRIS). The purpose of the Self-Directed Supports and Integrated Employment Innovation Project is to build on the strengths of Self-Determination and Self-Directed Supports in Wisconsin to improve employment outcomes for people with developmental disabilities.

In a statement on March 2, 2011 before the Committee on Health, Education, Labor and Pension in the United States Senate, Sharon Lewis, the Commission of the Administration on Developmental Disabilities (ADD) commented on the key relationship between self-determination and employment outcomes for people with developmental disabilities. She said, "For people with intellectual and developmental disabilities, self-determination is another important factor in employment outcomes. Individuals with ID/DD who have the degree of control they desire over their lives consistent with their capacities, strengths and needs are more likely to express satisfaction with their individual employment outcomes. Multiple studies indicate that self-determination status is a predictor of quality of life, and is positively correlated with improved employment, independent living, and community inclusion outcomes."

ADD has committed \$4 million over five years to a consortium of five University Centers for Excellence on Developmental Disabilities to lead a self-determination national training initiative, the "National Gateway to Self-Determination." The purpose of this project is to enable self-advocates, family members, professionals, agencies, and University Centers to "scale-up" efforts that promote self-determination throughout the lifespan and thereby positively affect individual outcomes. One component is a focus on the relationship between self-determination and employment, as self-determination is an essential element for enhancing individual control and involvement in employment, and ultimately job satisfaction and success.

The goal of this project is to build upon these efforts and develop, pilot and evaluate an "Innovative SDS and Integrated Employment model" in Wisconsin that combines the key principles and practices of SDS (e.g., choice, control, authority, person-centered planning, relationships and community connections) with best practices in Integrated Employment (e.g., discovery, person-centered employment planning, personal profile development, customized employment practices) to help people with developmental disabilities participating in long-term care obtain integrated employment in the community.

3. Statement of Work:

BPDD is looking to contract with an entity to:

- (1)** Research and identify best practices in SDS and Integrated Employment that are likely to lead to a person with a developmental disability obtaining integrated employment in the community. Research should include the "National Gateway to Self-Determination" Initiative funded by ADD and it' work on the relationship between self-determination as an essential element for enhancing individual control and involvement in employment and ultimately job satisfaction and success, as well as the Family Led Employment Project first initiated in the United Kingdom. This approach creates a shift in the "power" around employment planning from service providers to individuals

and families by using the thoughtful facilitation and group planning approach developed by Connie Lyle O'Brien and tools from the Customized Employment planning process.

- (2) Develop, pilot and evaluate an "innovative SDS and Integrated Employment Model" that combines the principles and practices of SDS (choice, control, authority, person-centered planning, relationships and community connections) with promising practices in Integrated Employment (e.g., discovery, person-centered employment planning, personal profile development, customized employment practices) to help people with developmental disabilities participating in long term care obtain Integrated Employment in the community.
- (3) Clearly describe and demonstrate how best practices/key elements of SDS will be operationalized and implemented in the model.
- (4) Clearly describe and demonstrate how best practices in integrated employment will be operationalized and implemented in the model.
- (5) Develop a work-plan that clearly specifies how the model will be developed, piloted, and implemented throughout the state over a five year period, including the number of people with developmental disabilities who will have integrated jobs in the community
- (6) Clearly describe your methods/means of implementation, including any on-line/web based training, learning circles, or on-line networks
- (7) Describe how you will select your pilot sites and partners (e.g., individuals with developmental disabilities, families, providers, MCOs, IRIS brokers). Include how you will recruit individuals with disabilities to participate in the pilots.
- (8) Develop an evaluation plan that will measure the impact of the key SDS and Integrated Employment components of the model and their effect on a person's ability to obtain integrated employment in the community.
- (9) Develop a communication and replication plan that specifies how results/learning will be shared, and how the model will be replicated and sustained after grant funding.

4. Funding:

Up to \$30,000 is available for this grant. The contract period for this grant will be from April 1, 2012 to September 30th, 2012. Based upon satisfactory performance, the contract recipient may be eligible to apply for continued grant funding for up to \$50,000 per year through 2016.

5. Who can Apply:

Any non-profit organization/entity that has demonstrated experience, knowledge, and expertise supporting people with developmental disabilities in learning self-determination skills/utilizing Self-Directed Supports options in the state, and in supporting people with developmental disabilities to obtain Integrated Employment in the community.

6. Definitions:

Although the terms Self-Determination and Self-Directed Supports are often used interchangeably, they are actually two distinct concepts with unique implications.

Self-determination, being the broader of the two elements, refers to the individual having control over all aspects of his or her life, and exercising basic rights such as citizenship, liberty, and the pursuit of happiness. This definition impacts activities beyond the scope of long-term care services.

Self-Directed Supports (SDS) are a facet of the larger self-determination philosophy. Stated simply, participants in long-term care programs actively direct the supports and services being provided. The term self-directed supports refers to a wide range of approaches designed to maximize choice and control for people who use long-term care services and supports. People who self-direct are able to hire, supervise, and fire their own direct care workers. But SDS involves many other elements as well,

including control of one's own budget for services, choice of services and supports, and decision-making authority.

Integrated Employment: Integrated Employment refers to working for a competitive wage in a community-based job (i.e., a job that is not based in a community rehabilitation facility). The employment must be in a work setting where, to the greatest extent possible, the employment typically involves interaction with co-workers and business associates who do not have disabilities and/or the public. Integrated employment includes employment located in community business, self-employment and ownership of micro-enterprises.

Section 2: Required Proposal Content

1. ***Application Cover Form:*** (located in Section 5 Attachment A)
2. ***Table of Contents:*** Identifies major sections along with page numbers.
3. ***Abstract:*** A one paragraph description of the project that includes: project need, purpose, objectives, method, long- and short-term outcomes
4. ***Response to Need and Purpose:***
A narrative that demonstrates knowledge of the need for and purpose of the project, including the scope and complexity. Include any insights/perspectives on the development and implementation of an SDS and Employment Innovation Model.
5. ***Project Narrative:***
A narrative providing a thorough description of how you intend to perform the various activities projected to address the need and accomplish the purpose of the project. It should at a minimum address the items in Section 1, #3 (Statement of Work). The narrative must also include specific goals, objectives, method and outcomes. It must also include a proposed plan for expansion over a five year period if funding were continued through 2016, as well as a sustainability plan describing how the efforts will continue after BPDD funding (2016) ceases.
6. ***Project Logic Model:*** (Logic Model Template Section 5 Attachment C):
Logic models are useful for the initiating organization's board members, leaders and staff, participating organizations, evaluators, and others seeking to understand the work. Logic models: convey the fundamental purpose of an initiative, show why the initiative is important, show what will result from an initiative, depict the actions/causes expected to lead to the desired results, become a common language and reference point for everyone involved in the initiative, serve as the basis to determine whether planned actions are likely to lead to the desired results
7. ***Project Work-plan:*** (Project Work-plan Template Section 5 Attachment D):
 - (1) A detailed work-plan for year 1 to chart the progress of the actions to be undertaken, including time frames and person responsible.
 - (2) A list of measurable outcomes for year 1
 - (3) A list of deliverables for year 1
8. ***Description of Staffing***
Provide a detailed description of staffing including:

- (1) A description of the lead organization/entity applying for this grant, including demonstrated expertise and experience in the area of research and evaluation and knowledge of best practices in Integrated Employment and SDS.
- (2) Any evaluations or descriptions of past or current projects similar to the functions of this proposal
- (3) A description of the staff that will be employed or contracted by the provider and their qualifications. Include resumes of the individuals proposed to work on the project. The resume shall include education, years of work experience, role and management responsibilities, licenses, certificates, and any relevant technical courses or training.

9. Description of Project Monitoring and Evaluation:

This section should describe the system used to monitor and evaluate project implementation and effectiveness. The description should include an explanation of:

- (1) how you will monitor the progress of the work and accomplishment of the outcomes;
- (2) how you will identify and address any project issues, problems or concerns, as they emerge; and
- (3) how you will evaluate the effectiveness of the project beginning in year one and subsequent years (should additional years of this project be funded, based on BPDD approval and the availability of funds)

10. Budget and Budget Narrative (Budget Template Section 5 Attachment B)

In this section, provide a proposed line item budget, accompanied by a detailed budget narrative using the format provided. The budget narrative must explain and demonstrate that each entry on the line item budget sheet is allowable, reasonable and necessary.

11. Letters of Recommendation:

Include at least three letters of recommendation that relate directly to the organization's ability to successfully complete the scope of work identified in this RFP. Letters of recommendation must be submitted with your proposal. Letters submitted after the proposal deadline or letters submitted directly to BPDD will not be accepted.

Section 3: RFP Submission Information

1. Submission Instructions:

This section describes how to correctly submit a proposal for this RFP. Failure to submit all information requested or failure to follow instructions may result in the proposal being considered nonresponsive and, therefore rejected. Please follow these instructions carefully:

- (1) Proposals must be delivered sealed, clearly marked "Self-Directed Support and Integrated Employment Innovation Project" and delivered by the deadline indicated on page 2 in the Schedule of Events and Timeline.
- (2) The proposal document should not exceed 15 pages in length, pages should be numbered with 1" margins, single or 1.5 spaced, no larger than letter size (8 1/2" x 11 ") and printed on one side only. Double-sided proposals will not be accepted. Proposal document length does not include: 1) table of contents, 2) index, 3) attachments, 4) budget proposals, and 5) other materials. The font size and type is at the discretion of the proposer, but must be at least as large as the font type you are currently reading (Arial 11).

- (3) Do not include spiral or bound materials or pamphlets. All attachments or exhibits must be letter size and if reduced to letter size must be readable. Ink and paper colors must not prevent the entire proposal from being photocopied. Each proposal should be unbound, collated, and include a table of contents with each section clearly labeled with the appropriate heading.
- (4) **An original and five copies** of the proposal and supporting materials are required. At least one copy of the proposal submitted to WI BPDD must contain an original signature of an official of the proposer who is authorized to bind the proposer to their proposal. This signature should be on the Application Form (**located in Section 5 Attachment A**). The original copy should be marked "original". One electronic version of the proposal also should be submitted on a CD or flash drive.
- (5) Items should be submitted in the following order:
 - A. **Application Form** (Template in Section 5 Attachment A)
 - B. **Table of Contents** (See Section 2- #2)
 - C. **Abstract** (See Section 2 -#3)
 - D. **Response to Need and Purpose** (See section 2- #4)
 - E. **Project Narrative** (See Section 2- #5)
 - F. **Project Logic Model** (See Section 2- #6/Template in Section 5 Attachment C)
 - G. **Project Work-plan** (see Section 2-#7/Template in Section 5 Attachment D)
 - H. **Description of Staffing** (See Section 2-#8)
 - I. **Description of Project Monitoring and Evaluation** (See Section 2-#9)
 - J. **Budget and Budget Narrative** (See Section 2-#10/Template in Section 5 Attachment B)
 - K. **Letters of Recommendation** (See section 2- #11)

2. Limitations on Contacting WI BPDD Personnel, Board Members and Committee Members:

Proposers are prohibited from contacting BPDD personnel, BPDD board members, or any member of the final Selection Committee other than the person named on the cover page of the RFP. Violation of this limitation may result in disqualification of the proposer. However, BPDD will conduct regularly scheduled business with proposers currently under contract.

3. Proposer Questions or Inquiries:

Questions related to this RFP must be received in writing or via e-mail by the contact person listed on the RFP Cover Page and in accordance with the Proposal Schedule of Events and Timeline listed on page #2 of this document. Telephone calls will not be accepted.

4. Acceptance of Proposals:

Proposals must be received by BPDD in accordance with the Proposal Schedule of Events and Timeline listed on page #2. No changes, modifications or additions to the proposals submitted after this deadline will be accepted by, or be binding on, BPDD. Any proposal submitted shall remain a valid offer for at least 60 days after the proposal submission date. Proposals not received at either the specified place, or by the specified date and time, or both, will be rejected and returned unopened by BPDD. Proposals may be sent via U.S. Mail, Express mail, or hand delivered.

5. Accommodations:

Any person with a qualified disability shall not be denied equal access and effective communication regarding any bid/proposal documents or the attendance at any related meeting or bid/proposal opening. If accommodations are needed because of a disability, please contact Ann Sievert at 608-267-9897 or at ann.sievert@wisconsin.gov.

6. Cost of Developing and Submitting a Proposal:

BPDD is not liable for any costs incurred by responding to this RFP. All proposals become the property of BPDD and will not be returned once opened. BPDD shall have the right to use any and all ideas or adaptations of ideas contained in any proposal received in response to this RFP. Selection or rejection of a proposal will not affect this right.

Section 4: Evaluation Criteria and Scoring

1. Selection Committee

A Selection Committee of not less than three people will be used to read, evaluate, and rank properly submitted proposals. The Selection Committee will be comprised of BPDD members and, if necessary, others with relevant experience.

2. Selection Committee Evaluation

The maximum possible score for any proposal is 100 points. While developing the proposal, please refer to the scoring criteria below for assuring completion.

The selection committee will consist of a minimum of three members. Each member will read and score each proposal independently, discuss each proposal jointly, and then submit final results for tabulation. The quantitative score from each member will be averaged and a final score will be assigned to the proposal. Scores will be ranked in numerical order from highest to lowest

The highest ranked proposal will be funded through this RFP. If negotiations with the highest ranked contractor are unsuccessful, the proposal will no longer be considered, and the next highest ranked proposal may be contacted for negotiation. This process will continue until a contract is awarded, or until the selection committee recommends otherwise. All proposals will remain with BPDD and will not be returned to the proposer after the RFP process is completed. Scored criteria are grouped into the following categories and weighting:

Abstract (5 Maximum points)

The proposal contains sufficient information to determine that the proposer understands the need for and purpose of this project.

Response to Need and Purpose (10 Maximum points)

The proposal includes a narrative that demonstrates knowledge of the need for and purpose of the project, including the scope and complexity, including any insights/perspectives on the development and implementation of an SDS and Integrated Employment Innovation Model.

Project Narrative (20 Maximum points)

The proposal contains a thorough description of the various activities projected to address the need and accomplish the purpose of the project. It addresses the items in Section 1, #3 (Statement of Work), as well as specific goals, objectives, method and outcomes. In addition, the narrative includes a proposed plan for expansion over a five year period (if funding were continued through 2016), as well as a sustainability plan describing how the efforts will continue after BPDD funding (2016) ceases.

Project Logic Model (10 Maximum points)

Logic models are useful for the initiating organization's board members, initiative leaders and staff, participating organizations, evaluators, and others seeking to understand the work. Logic models: convey the fundamental purpose of an initiative, show why the initiative is important, show what will result from an initiative, depict the actions/causes expected to lead to the desired results, become a common language and reference point for everyone involved in the initiative, serve as the basis to determine whether planned actions are likely to lead to the desired results

Project Work-plan (15 Maximum points)

The proposal contains a work-plan utilizing the work-plan template that includes:

- (1) A detailed description of the actions to be undertaken for the year, including time frames and person responsible.
- (2) A list of measurable outcomes for year 1
- (3) A list of deliverables for year 1

Description of Staffing (10 Maximum points)

The proposal provides a detailed description of staffing including:

- (1) A description of the lead organization/entity applying for this grant, including demonstrated expertise and experience in the area of research and evaluation and knowledge of best practices in Integrated Employment and SDS.
- (2) Any evaluations or descriptions of past or current projects similar to the functions of this proposal
- (3) A description of the staff that will be employed or contracted by the provider and their qualifications. Include resumes of the individuals proposed to work on the project. The resume shall include education, years of work experience, role and management responsibilities, licenses, certificates, and any relevant technical courses or training.

Description of Project Monitoring and Evaluation (15 Maximum points)

The proposal contains a description of the system used to monitor and evaluate project implementation and effectiveness. The description should include an explanation of (a) how the provider will monitor the progress of the work and accomplishment of the outcomes; (b) how the provider will identify and address any project issues, problems, or concerns, as they emerge; and (c) how the provider will evaluate the effectiveness/impact of the project beginning in year one and subsequent years (should additional years of this project be funded, based on BPDD approval and availability of funds).

Budget and Budget Narrative (10 Maximum points)

The proposal includes a proposed line item budget, accompanied by a detailed budget narrative, on a separate sheet of paper. The budget narrative must explain and demonstrate that each entry on the line item budget sheet is allowable, reasonable and necessary. The budget and budget narrative must present a cost-effective funding level for achieving the purpose of the project.

Letters of Recommendation (5 Maximum points)

The proposal includes at least three letters of recommendation that demonstrates the organization's ability to successfully complete the scope of work identified in this RFP.

TOTAL MAXIMUM POINTS 100

3. Identical Tie Bid:

When evaluating proposals, if BPDD is confronted with identical pricing or scoring from multiple providers, BPDD will invite the proposers with the tie bids to each make an oral presentation. Following the presentation and a question and answer period, the committee will select the proposal deemed most aligned with BPDD's mission and the objectives stated in the RFP.

4. Posting of Proposals Ranking

Ranking of responses to the RFP will be posted at the BPDD Offices located at 201 West Washington Avenue, Suite 110, Madison WI 53703 and on the BPDD website in accordance with the Proposal Schedule of Events and Timeline listed on page #2 of this document. The notice will be posted for 72 hours (3 business days).

5. Appeal Process

All applicants are informed, in writing and at the same time, about the results of the proposal review process. Applicants who do not agree with the decision may appeal. The following steps apply to the appeal process:

- (1) An applicant who wishes to appeal must notify the BPDD contact person listed on this RFP in writing within 15 working days of the date on the letter informing the applicant about the decision;
- (2) The appeal letter must include the basis for the appeal. The appeal must be based on the criteria used by the Grant Review Committee to review and evaluate each proposal;
- (3) Upon receipt of the letter of appeal, the BPDD contact person will establish an Ad Hoc Appeals Committee. This committee will be comprised of the BPDD Executive Director, members of the grant reviewer committee, and at least one BPDD member who is not a Grant Review Committee member;
- (4) The Ad Hoc Appeals Committee will meet as soon as possible (in no case later than the next regular DD Board meeting) to consider the appeal;
- (5) The Ad Hoc Appeal Committee will review the deliberations of the grant Review Committee and information presented by the applicant in the appeal letter. The Grant Review Committee may also request to hear from the applicant;
- (6) The Ad Hoc Appeals Committee review will determine if the recommendation of the Grant Review Committee appears to have been made according to the criteria contained on the Evaluation of Proposal form. Because the appeal letter must be based on these criteria, the information presented by the applicant will also be considered at this time;
- (7) The Ad hoc Appeals Committee will present its findings in writing to the applicant and the full Board at the next regular Board meeting.

6. Conflict of Interest

A conflict of interest exists when members of BPDD and staff participate in a process that results in recommendations related to funding of programs or projects while, at the same time, they have a direct to indirect personal or financial interest in one or more of these programs or projects. In order to avoid problems in this area, Board/staff members who have a direct or indirect personal or financial interest in an application or proposal or an organization that submitted an application or proposal must abstain from participating in the entire process of reviewing the applications in which the board/staff member has a conflict of interest. In this context, "personal or financial interest" includes, but is not limited to, the following:

- (1) The board/staff member or a member of the family will be employed by or is a paid consultant to the applicant organization;
- (2) The board/staff member or a member of the family is an officer of the applicant organization, serves on a committee that governs the applicant organization, or serves on the board of the applicant organization;
- (3) The board/staff member or a member of the family is receiving services from the applicant organization in any capacity if the applicant is funded;
- (4) The board/staff member or a member of the family is receiving services from the applicant organization, or will receive services from the applicant organization if the application is funded;
- (5) The Board/staff member or a member of the family is a party in any legal action in which the applicant organization is also a party.

Those members/staff of the BPDD who have, or believe they have, a direct or indirect personal or financial interest in any of the applications being considered by the BPDD must abstain from participating in the entire process of reviewing the application in which the BPDD member has a conflict of interest and must be recorded as abstaining when votes are taken.

7. Proposer Disqualification

To be disqualified as a proposer under this provision, the proposer must have: (1) had a contract terminated by Wisconsin BPDD for cause; or (2) developed or drafted specifications, requirements, statements of work, invitations for bids and/or requests for proposals contained within this RFP before its publication.

8. Post Award & Contract Development

BPDD will contact the proposer selected for award to begin contract negotiation. As part of the contract negotiation process, conditions identified by either BPDD staff or the selection team will be addressed. If the proposer has had their financial statements audited, a copy of the most recent audit statement, along with any management letter, will be requested. Additionally, a completed W-9 form will also be requested.

Section 5: RFP Forms and Templates

Attachment A: Application Cover

Attachment B: Budget Form/Summary

Attachment C: Logic Model Template

Attachment D: Work-plan Template

Attachment A: Application Cover

APPLICATION COVER

WI Board for People with Developmental Disabilities
Madison, WI 53703
Phone: (608) 266-7826
Email: bpddhelp@wi-bpdd.org

201 West Washington Ave,
Fax: (608) 267-3906

Organization: _____

Name: _____

Address: _____

Phone: (____) _____ FAX (____) _____

Contact: _____

Title: _____

WI Tax ID Number: _____ FEIN: _____

Program Title: _____

Budget Summary:

BPDD Share: \$ _____ %

Local Match: \$ _____ %

Total Cost: \$ _____ %

Certification:

I certify that to the best of my knowledge and belief, all information contained in this proposal is correct and complete; that, if approved, this program will be conducted according to this proposal, the requirements of the WI Board for People with Developmental Disabilities, Department of Administration, and provisions of the standards for programs funded under P.L. 106-402; and that the local match will be contributed as proposed. I also certify that the applicant organization has authorized me, as its representative, to give these assurances and submit this proposal.

Signature: _____
(original signature on original copy)

Date: _____

Title: _____

Attachment B: Budget Form/Summary

BUDGET FORM

EXPENSE CATEGORY	BPDD Funds	LOCAL MATCH
A. PERSONNEL		
Salary	_____	_____
Fringe	_____	_____
B. RENT		
	_____	_____
C. TRAVEL		
	_____	_____
<i>Staff:</i>		
Mileage/pkg	_____	_____
Food/lodging	_____	_____
<i>Participant:</i>		
Mileage/pkg	_____	_____
Food/lodging	_____	_____
D. SUPPLIES		
Office	_____	_____
Program materials	_____	_____
AV equipment	_____	_____
E. COMMUNICATIONS		
Phone/FAX	_____	_____
Internet/email	_____	_____
Postage	_____	_____
Copying	_____	_____
Alternative formats	_____	_____
F. OTHER		
Indirect costs/audit	_____	_____
Consultants/speakers	_____	_____
Respite/child care	_____	_____
Interpreters	_____	_____

BUDGET INFORMATION/SUMMARY

Please prepare your Budget Justification narrative using the following guidelines:

1. The Budget Form includes BPDD funds and local match for the entire program period. Enter the total amount that you expect to expend in BPDD funds and local match under each expense category (major line item noted in bold on the budget Form);

2. Include a separate Budget Justification narrative to fully explain and justify each expense category. Include the following information for each expense category:

a. PERSONNEL: Include salaries and wages. Identify the staff who will be working on this program and the hours each will devote to the program. Provide a breakdown of fringe benefits - health insurance, FICA, other insurance/benefits.

b. RENT: Rent should be part of the local match. Rent includes utilities, building/maintenance costs if paid (note separately and the amount), and the percent allocated to this program.

c. TRAVEL: Include local mileage and parking costs. If staff are reimbursed on a per mile basis, include the reimbursement rate that has been approved by your organization.

If out-of-town travel is necessary, explain the purpose for this travel, destination, length of stay, food and lodging allowances, any other transportation costs, and staff who will be traveling.

Include the same information for participants but do not identify individual participants. All local transportation costs should be included under this expense category.

NOTE: the reimbursement rate for participants MUST be the same as the reimbursement rate for staff;

d. SUPPLIES: Enter the total cost for all consumable supplies; note the cost for specific types of supplies such as those listed under this expense category.

e. COMMUNICATIONS: Include telephone/FAX, Internet and email services that are necessary to carry out this program. Postage and other mailing costs should be noted separately.

Copying costs are costs associated with duplicating or reproducing existing materials; printing costs would be the costs of producing a new product /publication. Converting print materials into other formats such as audiotape or large print, or translating materials, i.e. Braille, should be included in this expense category; PLEASE NOTE: When preparing fiscal reports (quarterly or monthly), actual costs must be reported. Costs as proposed or costs averaged during a reporting period will not be accepted.

f. OTHER: Indirect costs and audit cost should be included under this expense category. If indirect costs are being expensed, please note your organization's indirect cost rate and what is included in that rate.

3. Interpreter or facilitator costs may be necessary to assure effective communication with participants. Include respite/child care, and personal assistance services that are necessary so individuals can fully participate in the program. Grant funds should be the payer of last resort.

4. Identify the individuals and their respective organizations, if applicable, who will be asked to present on certain topic areas, and the total cost (or estimated cost). If a consultant/speaker's name is not yet available, indicate the topic area and a reasonable estimate of the cost allocated.

All proposed costs must be reasonable to carry out a quality program and achieve the intended program results.

BPDD funds are federal funds. If you are using dollars to meet your local match requirement, in whole or in part, those local match dollars cannot also be federal funds.

Attachment C: Logic Model Template

INPUTS	OUTPUTS/ ACTIVITIES	OUTCOMES/IMPACT	
		SHORT TERM	LONG TERM

Attachment D: Work-plan Template

Contract Name/Organization: Address:			Contact Information: Phone: E-mail:		
State Plan Goal: People with developmental disabilities will have a job of their choosing in the community.					
State Plan Objective: Double the number of individuals with developmental disabilities living in Wisconsin and participating in long-term care who are participating in integrated employment in the community by 2016.					
Scope of Work/Rationale:					
Project Activities:	Target Date:	Outcomes:	Target Date:	Deliverables/Products	Target Date:

