



DEPARTMENT OF HUMAN SERVICES

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DANIEL A. BRATTSET, Director
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REQUEST FOR PROPOSAL (RFP)

Wisconsin Home Energy Assistance Program (WHEAP) – Sauk County

- I. The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal and to inform them of basic requirements that the County uses as part of its standard contract process.
- II. Point of contact: Dan Brattset, Director
Sauk County Department of Human Services
505 Broadway Street
Baraboo, WI 53913
(608) 355-4202
dan.brattset@saukcountywi.gov

For clarifications or questions concerning this RFP, contact:
Dan Brattset, Director
Sauk County Dept. of Human Services
505 Broadway Street
Baraboo, WI 53913
(608) 355-4202
dan.brattset@saukcountywi.gov
- III. Proposal Due Date: E-mail of the proposal must be received and time stamped no later than **4:30 p.m., Central Standard Time, September 6, 2019**. Faxes are not acceptable. Proposals or amendments received by Sauk County after that time will not be considered and disqualifies your submission. (Note: The time stamp on your email submission will be the time stamp used to determine if the submission was received by the stated deadline.)
- IV. Application materials and schedules should be submitted via e-mail to:
Dan Brattset
dan.brattset@saukcountywi.gov

The word "WHEAP" must be indicated in the E-mail Subject Line.

**REQUEST FOR PROPOSAL
PART ONE
GENERAL INFORMATION**

1.0 GENERAL INFORMATION

1.1 Clarification of the Specifications

All inquiries concerning this RFP must be directed to Dan Brattset. Electronic mail is the preferred method of communication.

Any questions concerning this RFP must be submitted in writing by mail, fax or e-mail on or before August 28, 2019.

Proposers are expected to raise any questions, exceptions, or additions they have concerning the RFP document as this point in the RFP process. If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should immediately notify the contact person of such error and request modification or clarification of the RFP document.

Proposers are prohibited from communicating directly with any employee of Sauk County, except as described herein. No County employee or representative other than those individuals listed as County contacts in this RFP is authorized to provide any information or respond to any question or inquiry concerning this RFP.

One or more organizations may collaborate to submit a single proposal. The application shall include clearly delineated channels of communication, duties and memorandums of understanding where applicable.

1.2 Contract Term and Funding

The contract shall be effective on the date indicated on the contract execution date and shall run for 1 year from that date, with an option by mutual agreement of the County and contractor, to renew for 4 additional 1-year periods.

1.3 Reasonable Accommodations

The County will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations, contact the Department of Human Services at (608) 355-4200 (voice) or Wisconsin Relay (711).

2.0 PREPARING AND SUBMITTING A PROPOSAL

2.1 General Instructions

The evaluation and selection of a contractor and the contract will be based on the information submitted in the proposal plus references and any required on-site visits or oral interview presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g., expensive artwork) beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

2.2 Proprietary Information

All restrictions on the use of data contained within a proposal and all confidential information must be clearly stated on the attached “Designation of Confidential and Proprietary Information” form (Attachment C). Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with the applicable Wisconsin State Statute(s).

To the extent permitted by law, it is the intention of Sauk County to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of Sauk County. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

2.3 Incurring Costs

Sauk County is not liable for any cost incurred by proposers in replying to this RFP.

2.4 Submittal Instructions

Proposals must be received by the Department of Human Services by the specified time stated on the cover page. All proposals must be submitted via electronic mail. Proposals received in response to this solicitation will not be returned to the proposers.

All proposals must include:

- ☐ Completed Sauk County Department of Human Services Application Form
- ☐ Completed Budget and Personnel Schedules Spreadsheet
- ☐ Additional Information Requested in the RFP
- ☐ Completed Attachment A
- ☐ Completed Attachment B
- ☐ Completed Attachment C

2.5 Multiple Proposals

Multiple proposals from a vendor will be permissible; however, each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc.

2.6 Oral Presentations and Site Visits

Top ranked selected proposers may be required to make oral interview presentations and/or site visits to supplement their proposals, if requested by the County. The County will make every reasonable attempt to schedule each presentation at a time and location that is agreeable to the proposer. Failure of a proposer to conduct a presentation to the County on the date scheduled may result in rejection of the vendor’s proposal.

2.7 Post-Selection Review and Protest of Award

The Department will identify the selected Proposer in a "Notice of Intent to Award" letter. Identification of the selected Proposer is procedural only and creates no right of the named Proposer to award of the contract.

2.8 Investigation of References

The Department reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. The Department may postpone the award or the execution of the contract after identifying the selected Proposer in order to complete its investigation.

2.9 Cancellation

The Department reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.10 Proposal Terms

All Proposals, including any price quotations, will be valid and firm through a period of two hundred forty (240) calendar days following the Closing date. The Department may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.11 Oral Presentations

The Department, at its option only, may require Proposers to give an oral presentation of their Proposals, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the Department requests presentations, the Department will schedule the time and location for said presentation. All presentation costs shall be solely the responsibility of a Proposer and shall not be reimbursed by the County or Department.

2.12 Usage

It is the intention of the Department to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.13 RFP Incorporated into Contract

This RFP shall be incorporated into and made a part of the Contract between the Department and the selected Proposer. The Proposer shall be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of a Contract.

2.14 Communication Blackout Period

Except as called for in this RFP, Proposers may not communicate with members of the Sauk County Board or other County employees or representatives about the RFP during the

procurement process until the selected Proposer is identified, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer. Refer to Section 2.2 Requests for Clarification and Requests for Change.

2.15 Prohibition on Brokers and Agents

The Department will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process.

2.16 Ownership of Proposals

All Proposals in response to this RFP are the sole property of the County and Department, and subject to the provisions of public records.

2.17 Clerical Errors in Awards

The County and Department reserve the right to correct inaccurate awards resulting from its clerical errors.

2.18 Rejection of Qualified Proposals

Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP.

2.19 Collusion

Proposers shall not collude. Each submitted Proposal shall be deemed to include a declaration that it is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposers must certify that no officer, agent, elected official, or employee of the County has a pecuniary interest in their Proposal.

2.20 Commencement of Work

The selected Proposer shall commence no work until all insurance requirements have been met, and a Notice to Proceed has been issued by the County and Department.

2.21 Best and Final Offer

The County and Department may request best and final offers from those Proposers determined by them to be reasonably viable for contract award. However, the County and Department reserve the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, the County and Department may select for final contract negotiations/execution the offers that are most advantageous to them, considering cost and the evaluation criteria in this RFP.

2.22 Nondiscrimination

The selected Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, it and all subcontractors and agents shall not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental disability, national origin or ancestry, or any other class protected by applicable law.

3.0 PROPOSAL SELECTION AND AWARD PROCESS

3.1 Preliminary Evaluation

The proposals will first be reviewed to determine if requirements in Section 2.0 are met. In the event that all vendors do not meet one or more of the requirements, the County reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

3.2 Proposal Scoring

Accepted proposals will be reviewed by an evaluation team and scored against the stated criteria. This scoring will determine the ranking of vendors based upon their written proposals. If the team determines that it is in the best interest of the County to require oral presentations, the highest ranking vendors will be invited to make such presentations. Those vendors that participate in the interview process will then be scored, and the final ranking will be made based upon those scores.

3.3 Right to Reject Proposals and Negotiate Contract Terms

The County reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the County may negotiate a contract with the next highest scoring proposer.

3.4 Evaluation Criteria

The proposals will be scored using the following criteria:

Question	Description	Points
1	Program Description	15
2	Program Strategies and Activities	25
3	Equity and Inclusivity	5
4	Experience and Qualifications	20
5	Quality Improvement	10
6-7	Agency Governing Board/Staff	5
	Points	80
	Program Budget	
8	Budget Narrative and Schedules	20
	Total Points	100
	Local Vendor	0 - 5

4.0 SPECIAL CONTRACT TERMS AND CONDITIONS

4.1 Sauk County Department of Human Services Administrative Rate Ceiling

Contracts with the Department of Human Services limit administrative costs/expenses to a 15% ceiling.

5.0 STANDARD TERMS AND CONDITIONS

Standard contract requirements concerning Affirmative Action, the Americans with Disabilities Act, contract termination and modification, etc. are included in the County's boilerplate contract. For further information, you can view a copy of the contract by request.

**REQUEST FOR PROPOSAL
PART TWO
DESCRIPTION OF SERVICE**

1.0 PROGRAM SCOPE:

1. Program Description:

Sauk County is requesting proposals from service providers (Proposer) for the administration and delivery of the Wisconsin Home Energy Assistance Program (WHEAP).

WHEAP is funded by the U.S. Department of Health and Human Services' (HHS) Low Income Home Energy Assistance Program (LIHEAP) and Wisconsin's Public Benefit (PB) program. WHEAP aims to reduce a household's energy burden by providing a one-time payment to assist with a portion of the heating cost to low-income households that are at or below the 60 percent State Median Income limit. A household may also be eligible to receive a payment for non-heating electric costs through funding provided by the PB program.

The programs include:

WHEAP – Regular Benefits

Regular benefits provide assistance with current season heating (LIHEAP) and/or non-heating electric (PB) expenses. Regular Benefits are provided on behalf of eligible households to the energy vendor (utility or bulk fuel vendor) or, in a limited number of situations, directly to the applicant. Households may be eligible for one or both of the benefits. Households may receive only one regular heat and/or one regular electric (non-heating) benefit during each heating season (October 1 to May 15). Regular Benefits provide assistance with the home energy bills and are not intended to cover the total costs of heat or electricity.

WHEAP - Crisis Assistance Benefit

Crisis Assistance, whether LIHEAP or PB, is intended to allow the local WHEAP administering agency to respond to special situations; dealing with emergency situations or acting proactively to avoid energy loss. Crisis Assistance is a discretionary benefit to households; even if a household is eligible, they may not receive crisis assistance. The eligibility requirements are determined by the local WHEAP agency.

Crisis Services funds are also allocated to local WHEAP agencies to provide a mechanism for purchase of services (such as education-energy or financial) and goods (such as Weatherization kits) for customers. These funds may also be used to cover local agency costs of processing applications for Crisis Assistance.

WHEAP – Furnace Service

Eligible households, whose furnace (heating system) ceases to operate or presents a safety threat to a household, may be eligible to receive furnace services. Eligibility for furnace services shall be determined by the local WHEAP agency before any service is provided. Furnace services are a discretionary benefit to households; even if a household is eligible, they may not receive services.

The HE+ Furnace Program eligibility criteria and service requirements are outlined in the HE+ Furnace Program Manual.

Eligibility criteria determination and authorization of WHEAP is according to the policies of the Division of Energy, Housing & Community Resources (DEHCR) as contained in the WHEAP Operations Manual.

The WHEAP Operations Manual is available at the Home Energy Plus (HE+) Website:
<http://www.homeenergyplus.wi.gov/>

2. Goals:

The Proposer shall administer the following programs throughout the program year in accordance with the WHEAP Operations Manual: WHEAP Regular Benefits, WHEAP Crisis Assistance Benefit, and WHEAP Furnace Service.

Provider shall also:

- Provide support to households in applying for energy assistance, crisis assistance, and furnace services through the Wisconsin Home Energy Assistance Program (WHEAP);
- Ensure a convenient, customer-friendly environment to apply for WHEAP;
- Connect customer needs with appropriate resources through a needs assessment, vendor advocacy, energy education, financial counseling and/or case management;
- Provide resources and services to qualifying households to reduce their energy burden;
- Promote innovative, cost-efficient, evidence-based outreach methods for providing energy assistance to low-income households in Sauk County;
- Maintain or increase caseload by 5%;
- Return a customer's phone call same day or next day.

3. Needs/Expectations:

The awarded Contractor shall be responsible for conducting the daily operation of WHEAP at an approved facility. The awarded Contractor shall be responsible for the orderly safekeeping, maintenance, and operation of all equipment and facilities in use for the operation of the program. The awarded Contractor shall follow industry standards, best practices, and applicable Federal, State, and local regulations and standards to ensure safe operations for employees, customers and the general public.

A. Through the selection process, the awarded Contractor should meet the following objectives:

- Fully administer the WHEAP in accordance with the WHEAP Operations Manual and Home Energy Plus (HE+) Furnace Manual
- Efficiently and accurately determine eligibility for applicants and process benefit/service requests in a policy compliant and timely manner
- Provide case management for all customers
- Operate various site(s) throughout Sauk County in order to provide sufficient access to County residents
- Provide a local or toll-free telephone number that people can call, year-round, to inquire about the Home Energy Plus programs

- Maintain a 24/7 crisis contact number for evening and weekend emergencies
- Provide a public site with information regarding WHEAP. It shall include, but is not limited to, application requirements, application site(s), and hours of operation, and emergency/after-hours procedures
- Authorize payments, fuel delivery, and/or disconnection prevention to eligible individuals to meet emergency needs
- Provide eligibility for and administration of the HE+ Furnace Program
- Annually complete the DEHCR required Crisis Plan and Program Operations and Community Services Plan
- Implement and maintain an HE+ compliant General Quality Assurance Plan and Furnace Quality Assurance Plan
- Participate in Administrative Reviews and Desktop Monitoring (DTM) conducted by the Division of Energy, Housing & Community Resources
- Provide outreach services to maximize participation of WHEAP
- Ensure that persons with limited English proficiency (LEP) or those who are disabled/impaired have equal access to benefits and services
- Complete HE+ policy compliant internal General Quality Assurance and Furnace Quality Assurance activities
- Establish a disaster plan according to the WHEAP Operations Manual
- Annually attend the Home Energy Plus Training Event
- Provide accurate monthly billing of all activity by funding source in accordance with the approved annual budget and the WHEAP Operations Manual

B. Human Resources

1. The Contractor shall have a designated Human Resources person or department to maintain personnel files for employees that meet the requirements of state and/or federal regulations concerning personnel. These records should include training, Criteria-based Job Descriptions, Annual Performance Evaluations and Reviews, Competency Testing and Documentation, driver record abstracts, and caregiver background checks. A complete staffing roster shall be submitted prior to the start of the program year. Any changes in staff should be reported to Sauk County. Background checks need to be provided to Sauk County along with the staffing roster for new staff.
2. The contractor shall ensure that, at a minimum, the following contractual requirements be part of the internal Policy and Procedure for Human Resources in regards to Caregiver Background Checks.
 - a. Caregiver background checks (CBCs) need to be processed for all employees (direct, indirect, and contractual) associated with the contract no more than 90 days prior to the date of hire. CBCs should be processed at intervals no greater than every four (4) years thereafter. Employees that are on seasonal layoff, medical leave or otherwise not actively employed for more than 90 days shall be treated as new employees and have a CBC processed prior to their return to work.
 - b. Hiring practices related to the contract are subject to the Wisconsin Caregiver Law and Sauk County regulations. No employee with a barrable offense or substantially related offense may provide any service related to the contract.
 - c. Employees are required to report any convictions or new arrests to the Contractor within 24 hours of the event.

- d. The Contractor shall be responsible to ensure that all employees for this program meet the criteria established under the Wisconsin Caregiver law and that all documentation is present prior to the employee beginning work. Sauk County has to the right to review any caregiver background checks and disallow any employee to provide services for this program.
3. The Contractor shall ensure that all staff are trained and demonstrates proficiency in accurately applying WHEAP policies and procedures. New employees are required to attend the DEHCR administered "New Worker" basic intake training.

C. Service Plan Proposal

1. Location

The contractor shall operate a facility that is open to the public within Sauk County. The Contractor shall be responsible to ensure the property meets all ADA, zoning and occupancy requirements and obtain any and all occupancy permits. The Contractor should make every effort to have sufficient parking available.

2. Hours of Operations

At minimum, the Contractor's agency shall provide services from 8 a.m. to 4:30 p.m. During peak times, the agency site shall provide evening hours at least one (1) day per week. Hours of operation need to be clearly posted at the agency.

3. Days of Operation

Customers shall have access to services Monday through Friday. Weekend hours are optional. A list of major holiday/closure dates must be provided to the County prior to each season and posted at the agency.

4. Severe Weather Closure Policy

The Contractor shall have a written severe weather closure policy.

5. Emergency Services

During the heating season, assistance must be available 24 hours per day, 7 days per week for emergency furnace ("no heat") referrals. The procedure for handling emergency services shall be incorporated into Sauk County's Furnace Contact Information Form and Crisis Plan.

6. Phone System

The Contractor shall establish and publicize a local or toll-free telephone number that persons can call year-round for general HE+ information. Criteria is subject to the WHEAP Operations Manual.

The Contractor shall have the ability to receive calls and messages 24 hours per day, seven (7) days per week. The agency shall retrieve and return calls in the order received within three (3) business days. The outgoing message shall include, but is not limited to business name, location, hours of operation (including closures), emergency/after-hours contact information, and application procedures. The agency shall provide a message script annually, prior to the start of the energy season.

7. Access

The Contractor shall ensure that all applicants have meaningful and equal access to benefits and services. This includes, but is not limited to, persons with limited English proficiency (LEP) and those who are disabled or impaired.

8. Application Intake

The Contractor shall provide access for any Sauk County resident to file an application for WHEAP. Any household within Sauk County is eligible to apply for benefits and services at the location(s) of their choosing. Applications shall be processed within the guidelines set forth in the WHEAP Operations Manual.

- **Walk-in Applicants**

The Contractor may determine the method and manner walk-in applicants are processed. Hours of operation and application procedures shall be posted at the site.

- **Phone Applications**

The contractor shall offer phone applications. Customers requesting a phone application shall have an appointment assigned within three (3) business days of the request.

- **Home Visits**

The Contractor shall offer home visits. Customers shall have an appointment assigned within three (3) business days of the request.

- **Outreach Sites**

The Contractor shall develop a plan to reach targeted households. In addition, a schedule of alternative application sites and information points should be developed.

- **Early Application**

The Contractor shall accept early applications during the current program year for the upcoming heating year, regardless of the contract status of the future season. The early application schedule is determined by DEHCR.

- **Crisis**

The Contractor, along with Sauk County, determines the crisis criteria for the Crisis Plan each year. The Crisis Plan shall be approved by Sauk County before submitting it to DEHCR.

The Contractor shall be required to administer or provide all services designated in the Crisis Plan. These services have included, but are not limited to: application processing, enrollment in an assistance plan, assisting in setting up a utility payment plan, providing workshops, or case management.

9. Site Representative

The Contractor must identify a Coordinator for each site(s). The person will be the main contact person for inquiries and site information. In addition, a quality assurance person shall be designated. This person may or may not be the Coordinator.

Participation in core workgroups, committees and all training activities is required of the Coordinator. In addition, the Coordinator will have input in process improvement activities and developing annual state plans.

10. Staffing/Personnel

Each site shall have a Coordinator to oversee site operations and be the primary site contact. Each site shall have a Quality Assurance person to oversee Quality Assurance and monitoring activities. The staffing plan shall include the number of staff and the number of daily and weekly staff hours needed to provide effective customer service. Staff may be full or part time based on the Contractor's needs. All staff must meet the Wisconsin Caregiver Background Check (CBC) criteria. A roster of all direct and indirect staff (including compliance with CBC, driving and training requirements) is required to be submitted prior to the start of the program year. All staff submissions are subject to Sauk County review and approval.

11. Marketing Materials

All marketing materials must contain State, County and Weatherization Agency logos. All posted materials are subject to State and County approval.

12. Website

The Contractor shall have a public website. Information regarding the Sauk County WHEAP program shall be accessible from the Contractor's home page. The WHEAP page shall include, but is not limited to, application requirements, application sites and hours of operation, and emergency/afterhours information. In addition, the site should offer links to state WHEAP information and all Sauk County application site(s). Website content is subject to State and County approval.

D. Quality Assurance Requirements

1. Quality Assurance and Monitoring

The Contractor shall be responsible to ensure accurate and timely processing of all applications taken with the County. The Contractor shall provide a Quality Assurance (QA)/Monitoring plan.

2. Customer Complaints

The Contractor shall respond to customer complaints in a timely and professional manner. The County or State may request additional information regarding an application or customer follow up. The Contractor shall designate a representative to receive and track complaints. The designee shall respond or acknowledge the request within the same business day.

3. Fair Hearings

Customers have the right to request a fair hearing about benefit determination made by the Contractor. The Contractor is required to respond to fair hearing requests for determinations made at their application site. Sauk County will be notified by the State Division of Hearings and Appeals of any hearing requests. Those requests shall be forwarded via email to the Contractor to provide case records and attend the hearing on behalf of the County. All fair hearing notifications shall be acknowledged via email within 24 hours (one (1) business day).

4. File Retention

The Contractor shall maintain all required application documents for five (5) years after the completion of the contract year. The Contractor is required to maintain records in a confidential manner in accordance with Wisconsin State Statutes and any other applicable state or federal laws. The Contractor shall demonstrate

compliance with all WHEAP guidelines for handling sensitive data as listed in the WHEAP Operations Manual.

5. Committee Participation

The Contractor shall participate in the following committees/activities:

- State and County reviews
- Any core workgroup(s)
- State meetings and trainings
- Other State and County meetings and committees as needed

E. Fiscal Operations and Invoicing Requirements

Billing is based on actual expenses. The Contractor shall provide accurate monthly billing of all activities by funding source in accordance with the approved annual budget and the WHEAP Operations Manual. Billing statements and reports are due no later than the 15th business day of the month following the service delivery month. Actual expenses are required to be reported in each funding source for each month of the contract, even if expenses exceed the contract amount. In addition, the agency shall provide when requested by Sauk County:

- A monthly report of outreach and crisis activities.
- A monthly report of customers served.

4. Current Operations:

In Federal Fiscal Year (FFY) 2018/2019, the agency processed over 2,319 applications and issued over \$1,178,894 in regular and crisis benefits to Sauk County residents. Additional information on FFY 2018 and prior years for Sauk County, the State of Wisconsin, and other counties can be found on the Detailed Reports page of the Wisconsin Home Energy Plus webpage via:

<http://homeenergyplus.wi.gov/category.asp?linkcatid=273&linkid=120&locid=25>

Customer Data	Count	Expenditures
Total Number of Households Applied for Energy Assistance	2,319	
Number of Households Paid Energy Assistance	2,056	\$1,149,283
(Average Heat Benefit)	2,022	\$698,062 (\$345)
(Average PB Benefit)	1,950	\$451,222 (\$231)
Total Number of Households Paid Crisis Assistance	93	\$29,611
(Average Heat Benefit)	65	\$19,111 (\$294)
(Average PB Benefit)	31	\$10,500 (\$339)
Total Heating Unit Activity Paid	53	\$67,983
Total Heating Unit Repairs Paid	33	\$8,853
Total Heating Unit Replacements Paid	19	\$59,000
Total Heating Unit Paid Assessment Only	1	\$130

5. Maximum funding available for this program is \$207,289.

Annual allocations vary and Sauk County may, in future years hold back some part of the allocation for County Administration overhead.

The amount held back will not exceed 10% of the grant award.

2.0 SCDHS Application Form:

1. PROGRAM DESCRIPTION (15 points)

- A. Describe your proposed program and how it is going to meet the needs described in the RFP. This should be an overview.
- B. Include your agency's mission statement. Also provide résumés of key staff and copy(s) of licenses, if applicable. These may be separate attachments and not included in the page count.
- C. You have up to **2** pages to respond to Question 1.

2. PROGRAM STRATEGIES AND ACTIVITIES (25 points)

- A. Describe the specific strategies and activities to be used to achieve the stated objectives, expectations, and desired outcomes in the RFP. At a minimum this should include the following elements:
 - i. Location
 - ii. Hours of Operations
 - iii. Days of Operation
 - iv. Severe Weather Closure Policy
 - v. Emergency Services
 - vi. Phone System
 - vii. Application Intake
 - viii. Site Representative
 - ix. Staffing/Personnel
 - x. Human Resources
 - xi. Marketing Materials
 - xii. Web Site
 - xiii. Quality Assurance and Monitoring
 - xiv. Customer Complaints
 - xv. Fair Hearings
 - xvi. File Retention
- B. You have up to **10** pages to respond to Question 2.

3. EQUITY AND INCLUSIVITY (5 points)

- A. What efforts does or will your agency engage in to make this program culturally relevant and promote racial equity?
- B. Describe how your agency will ensure that all applicants have meaningful and equal access to benefits and services. This includes, but is not limited to, persons with limited English proficiency (LEP) and those who are disabled or impaired.
- C. You have up to **2** pages to respond to Question 3.

4. EXPERIENCE AND QUALIFICATIONS FOR THE PROPOSED PROGRAM (20 points)

- A. Describe the experience and qualification of your agency. Include a staff turnover calculation for the previous year. If you had 20% or more turnover in a certain staff position/category, please explain. Also address any noteworthy staff retention issues or policies to reduce staff turnover.
- B. Describe your staffing pattern including the number of Full Time Equivalent positions necessary to provide the service. Proposal shall provide an organizational chart(s) that indicates positions proposed to implement this project and copies of position descriptions. Proposal shall provide resumes, qualifications and any completed certifications of Management Staff, Supervisor Staff, and Site Representatives to be assigned to this contract.

- C. Include a functional description of the responsibilities of all relevant positions that are involved in this project.
 - D. Describe the qualifications of all personnel who are to be assigned or are proposed for this project. Information about education, training, experience and certifications should be included. Proposal shall provide two or three professional references for employees assigned or proposed to the project. (Provision of professional references is an optional requirement.)
 - E. Submit 2-3 letters of reference. References should be specific to the service offered. References should be from agencies you have done business with or those with whom you have collaborated. These may be separate attachments and not included in the page count.
 - F. Provide your organization or agency structure.
 - G. Provide the name(s) and contact information of principal officers/managers, years of experience of each WHEAP Service business, agency, organization, and/or company and the number of years with current establishment.
 - H. Describe your agency's experience in providing WHEAP services.
 - I. Describe your agency's experience in conducting Wisconsin Caregiver Background Checks on employees and prospective employees.
 - J. Provide any data available demonstrating your ability to achieve the Agency's desired outcomes.
 - K. You have up to **8** pages to respond to Question 4.
5. **QUALITY IMPROVEMENT (10 points)**
- A. Describe any programmatic or administrative improvements that have improved your agency's ability to deliver services. Also describe any ongoing quality assurance procedures and practices your agency has in place.
 - B. Describe your agency's experience with and plan to address:
 - i. Quality assurance and monitoring
 - ii. Customer complaints
 - iii. Fair hearings
 - iv. File retention
 - v. Customer participation
 - C. You have up to **5** pages to respond to Question 5.
6. **AGENCY GOVERNING BODY:** Respond to the stated questions and complete the grid provided in the application form.
7. **STAFF-BOARD-VOLUNTEER DESCRIPTORS:** Complete the grid provided in the application form. (Q 6-7 combined 5 points)
8. **BUDGET NARRATIVE (20 points)**
- A. Please indicate the total amount of funding you are requesting from the County in your proposal. List other funders and funding amounts, if applicable. Also include other information necessary to understand your budget such as a unit cost or a per person cost if appropriate. For existing programs, please explain any line item that reflects a 10% variance (increase or decrease) in comparison to the prior budget year.
 - B. You have up to **3** pages to respond to Question 8.

Remember to submit completed Attachments A, B, and C, which are included in the application form along with the Budget and Personnel Schedules Spreadsheets.