

ORIGINAL

YEAR 2015 PROPOSAL SUMMARY SHEET

ITEM # 1

Agency: Community Advocates, Inc. Agency Director: Andrea Mallmann-Elliott

Name of parent company and/or affiliated enterprises if agency is a subsidiary and/or affiliate of another business entity: N/A

Address: 728 N. James Lovell Street Milwaukee WI 53233
(Street) (City) (State) (Zip)

Contact Person: Andrea Mallmann-Elliott

Telephone #: (414) 270-2941 Email: andie@communityadvocates.net

Agency Fiscal Period: January 1 – December 31 Federal ID Number: 39-1249426

Please complete the following information for each 2015 program proposed in your proposal. Program name, and if applicable, a program number must be assigned to each program. This proposal must include programs from only one division. In order to apply for programs from more than one division, a separate, complete proposal must be submitted for each division.

Division: DCSD DSD MSD Housing

REFER TO TABLE OF CONTENTS IN PROGRAM REQUIREMENTS FOR PROGRAM NUMBER & NAME

A. Program Number: MSD 001 Program Name: Wisconsin Home Energy Assistance Program
Continuation New

2014 Funding: \$397,431.70 2015 Request: \$1,329,254 Administration and Operation
2014 Funding: \$108,730.64 2015 Request: \$581,797 Crisis Services
2014 Funding: \$193,479.88 2015 Request: \$311,417 Outreach

Site(s):

- (1) 728 N. James Lovell Street, Milwaukee, 53233 (3) Robles Center 910 W. Mitchell St., 53204
- (2) 4906 W. Fond du Lac Avenue, Milwaukee, 53216 (4) City of Milw. HACM-809 N. Broadway, 53202
- (1) Other Partner Sites (scattered)

THIS SHEET MUST BE ATTACHED TO THE TOP OF THE PROPOSAL PACKAGE.
PLEASE DUPLICATE AS NEEDED. PLEASE USE A SEPARATE SHEET FOR EACH DHHS DIVISION FOR WHICH YOU ARE SUBMITTING PROPOSALS, AS WELL AS A SEPARATE SHEET FOR EACH PROGRAM WITHIN EACH DIVISION FOR WHICH YOU ARE APPLYING

2015 PURCHASE OF SERVICE PROPOSAL CONTENTS – I. INITIAL SUBMISSION

This proposal contents sheet must be attached immediately after the proposal summary sheet (item #1)

Technical Requirements		Proposal	
Item #	Item Description	Check each Item Included	Page # of Proposal

INTRODUCTION

1	Proposal Summary Sheet	✓	1
	Proposal Contents	✓	i
2	Cover Letter	✓	2

Part 1 – AGENCY PROPOSAL

3	Authorization To File	✓	3
4	Agency Description and Assurances	✓	4
5	Board Of Directors, Owners, Stockholders Demographic Summary	✓	6
6	Ownership, Independence, and Governance	✓	8
7	Owners/Officers	✓	10
8	Mission Statement	✓	11
9	Agency Organizational Chart	✓	12
10	Agency Licenses and Certificates	✓	13
11	Indemnity, Data And Information, and HIPAA Compliance Statement		14
13	Related Organization/Related Party Disclosure	✓	15
14	Employee Hours-Related Organization Disclosure	✓	16
15	Conflict Of Interest & Prohibited Practices Certification	✓	17
16	Equal Employment Opportunity Certificate	✓	18
17	Equal Opportunity Policy	✓	19
18	Audit Fraud Hotline		20
19	Certification Statement Regarding Debarment And Suspension	✓	21
20	Additional Disclosures	✓	22
21	Certification Regarding Compliance With Background Checks – Children & Youth	✓	23
22	Certification Regarding Compliance With Background Checks - Caregiver	✓	24
23	Promotion of Cultural Competence	✓	25
24	Emergency Management Plan	✓	27

Part 2 – BUDGET AND OTHER FINANCIAL INFORMATION

25	IRS Form 990 For Non-Profit Agencies	✓	35
26	Certified Audit/Board Approved Financial Statement	✓	36
27	Electronic versions of: Form 1 (Program Volume Data)	✓	37-109
	Form 2 and 2A	✓	
	Form 2B	✓	
	Form 3 and 3S (Anticipated Program Expenses)	✓	

	Form 4 and 4S (Anticipated Program Revenue)	✓	
	Form 5 and 5A	✓	
	Form 6-6H	✓	

Part 3 –PROGRAM PROPOSAL

Technical Requirements		Proposal	
Item #	Item Description	Check each Item Included	Page # of Proposal
<u>Part 3 –PROGRAM PROPOSAL</u>			
28	Program Organizational Chart	✓	110
29a	Program Logic Model	✓	111
29b	Program Narrative	✓	119
29c	Experience Assessment For Agency	✓	151
29d	Experience Assessment For Agency Leadership	✓	152
29e	Most Recent Program Evaluation (Current Contractors)		153
30	Provider Proposal Site Information	✓	154
31	Accessibility	✓	163
32	Staffing Plan	✓	165
33	Staffing Requirements	✓	167
34	Current Direct Service Provider/Indirect Staff Roster	✓	231
36	Client Characteristics Chart	✓	232
<u>Attachments</u>			
Attachment A	Resumes for Board of Directors		Lime
Attachment B	Client Service Provision		Lavender
Attachment C	Sample Postcard & Flyers		Blue
Attachment D	MOUs		Yellow
Attachment E	Online Screening Tool & Online Appointment Screen		Peach
Attachment F	Letters of Support		Tan
Attachment G	Maps		Pink

DCPI	Designation of Confidential and Proprietary Information		N/A
SDE	Statement of Deviations and Exceptions		N/A

Note: DCPI and SDE forms are optional, check column if included

Part 4 - OVERVIEW OF PROPOSAL REVIEW PROCESS, PROPOSAL REVIEW AND SCORING CRITERIA

Overview Of Proposal Review Process
Proposal Review and Scoring Criteria

Agency attests that all items and documents checked are complete and included in the proposal packet.

Authorized Signature: Andrea Mallmann-Elliott Date: March 20, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.



ITEM # 2

March 20, 2015

Mr. Héctor Colón, Director
Milwaukee County Department of Health and Human Services
1220 West Vliet Street, Room 301R
Milwaukee, WI 53205

Dear Mr. Colón:

I am familiar with the *"Year 2015 Purchase of Service Guidelines: Program and Technical Requirements"* set forth by the Milwaukee County Department of Health and Human Services and am submitting the attached proposal which, to the best of my knowledge, is a true and complete representation of the requested materials.

Sincerely,


Andrea Mallmann-Elliott
Chief Executive Officer

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728 North James Lovell Street Milwaukee, WI 53233 (414) 419-4777 communityadvocates.net

YEAR 2015 AUTHORIZATION TO FILE RESOLUTION
(Applicable for Non-Profit and For-Profit Corporations Only)

PLEASE NOTE: Proposals cannot be recommended for funding to the Milwaukee County Board until the Authorization to File is completed and received by DHHS Contract Administration.

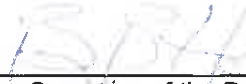
This is to certify that at the February 18, 2015 meeting of the Board of Directors of Community Advocates, Inc. (Agency Name), the following resolution was

introduced by Tim Charek, and seconded by Steve Hargarten, and approved by the Board with abstentions from Thelma Sias and Jodi Wire:

BE IT RESOLVED, that the Board of Directors of Community Advocates, Inc. hereby authorizes the filing of a proposal for the Year 2015 Milwaukee County Department of Health and Human Services (DHHS) funding.

In connection therewith, Andrea Elliott, CEO and Maudwella Kirkendoll, COO are authorized to negotiate with DHHS staff.

In accordance with the Bylaws (Article IV, Section 4.1) of Community Advocates, Inc.; Andrea Elliott, CEO and Maudwella Kirkendoll, COO are authorized to sign the Year 2015 Purchase of Service Contract(s).

Name: 
(Signature of the Secretary of the Board of Directors)
Date: February 18, 2015

Printed Name: Bryan House

YEAR 2015 AGENCY DESCRIPTION AND ASSURANCES

Please check all the statements below that describe your business entity:

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Corporation | <input type="checkbox"/> Partnership/Joint Venture | <input type="checkbox"/> Service Corporation (SC) |
| <input type="checkbox"/> For-Profit | <input type="checkbox"/> Limited Liability Company (LLC) | <input type="checkbox"/> Sole Proprietorship |
| <input checked="" type="checkbox"/> Non-Profit | <input type="checkbox"/> Single Member LLC | <input type="checkbox"/> Individual Credentialed Provider |

The agency has on file and agrees to make the following documents available for review upon request by DHHS.

- X Articles of Incorporation (*applicable for Corporations only*)
- Operating Agreement (*applicable for LLC only*)
- X Bylaws (*applicable for Corporations only*)
- X Personnel Policies
- X A client grievance procedure informing clients covered under DHS 94 of their rights and identifying the process clients may use to enforce those rights. The procedure is in compliance with Wisconsin Statute §51.61 and Wisconsin Administrative Code DHS 94.
- X Audit Hotline Policy (see item 18)
- X Accounting Policies and Procedure Manual in compliance with General Accepted Accounting Principles (GAAP) and the Wisconsin Department of Health and Family Services (DHFS) allowable cost policies.
- X Agency billing procedure, in compliance with DHS 1, regulating billing and collection activities for care and services provided by the agency and purchased by Milwaukee County.
- X A 'whistleblower' policy and procedure that enables individuals to come forward with credible information on illegal practices or violations of organizational policies. This policy must specify that the organization will not retaliate against individuals who make such reports.
- X A conflict of interest policy and procedure to ensure all conflicts of interest, or appearance thereof, within the agency and the Board of Directors (if applicable) are avoided or appropriately managed through disclosure, recusal, or other means. At a minimum, the policy should require full written disclosure of all potential conflicts of interest within the organization.
- X A code of ethics policy, which outlines the practices and behaviors expected from trustees, staff, and volunteers. The code of ethics policy shall be adopted by the board and shall be disseminated to all affected groups as part of orientation and updated annually.

X An emergency policy, which outlines the policies and procedures to be prepared for an emergency such as a tornado, blizzard, electrical blackout, pandemic influenza, or other natural or man-made disaster. Provider shall develop a written plan, to be retained in the Provider's office, which addresses:

1. The steps Provider has taken or will be taking to prepare for an emergency;
2. Which, if any, of Provider's services will remain operational during an emergency;
3. The role of staff members during an emergency;
4. Provider's order of succession and emergency communications plan; and
5. How Provider will assist Participants/Service Recipients to individually prepare for an emergency.

Providers who offer case management or residential care for individuals with substantial cognitive, medical, or physical needs are actively encouraged to develop an individualized emergency preparedness plan and shall assure at-risk Participants/Service Recipients have been offered any assistance they might require to complete the plan.

X Occupancy Permit and/or other permits required by local municipalities, as applicable, for services being provided.

Agency agrees to submit 2 original copies of a certified audit report, performed by an independent certified public accountant licensed to practice by the State of Wisconsin, in compliance with the audit requirements of the Purchase of Service Contract.

Authorized Signature: Andrea Mallmann-Elliott Date: March 20, 2015

Printed Name: Andrea Mallmann- Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

Items 5, 6, & 7 partially comprise the points scored under Administrative Ability
 Item 5 partially comprises the points scored under Cultural Diversity and Cultural Competence

ITEM # 5

**YEAR 2015 BOARD OF DIRECTORS/AGENCY OWNERS/STOCKHOLDERS
 DEMOGRAPHY SUMMARY**

Board members and staff must be able to serve a culturally diverse population in a manner that reflects culturally competent decision making and service delivery.

***Cultural Diversity** – The presence of individuals and groups from different cultures. Cultural diversity in the workplace refers to the degree to which an organization, agency or other group is comprised of people from a variety of differing backgrounds related to behaviors, attitudes, practices, beliefs, values, and racial and ethnic identity.*

Ethnicity	Female	Male	Disabled
Asian or Pacific Islander	1		
Black	3		
Hispanic	1		
American Indian or Alaskan Native			
White	7	5	
Totals	12	5	

A "disabled individual" is defined pursuant to section 504 of the Rehabilitation Act of 1973 as any person who:

1. Has a physical or mental impairment that substantially limits one or more major life activities (e.g. caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning and working);
2. Has a record of such impairment, or;
3. Is regarded as having such impairment.

Ethnicity is defined as:

1. **Asian or Pacific Islander:** All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands and Samoa.
2. **Black:** All persons having origins in any of the Black racial groups of Africa.
3. **Hispanic:** All persons of Mexican, Puerto Rican, Cuban, Central or South America or other Spanish culture or origin, regardless of race. (Excludes Portugal, Spain, or other European countries).

4. American Indian or Alaskan Native: All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.
5. White: All persons who are not Asian or Pacific Islander, Black, Hispanic, American Indian or Alaskan Native.

Authorized Signature:  Date: **March 20, 2015**

Printed Name: **Andrea Mallmann-Elliott** Title: **Chief Executive Officer**

Agency: **Community Advocates, Inc.**

YEAR 2015 BOARD OF DIRECTORS OWNERSHIP, INDEPENDENCE, COMPENSATION, AND GOVERNANCE (Applicable to for-profit and nonprofit Corporations Only)

Please list the current board members and indicate the office title, term, percentage of ownership interest (applicable for for-profit corporations only), amount of prior year's distributions or dividends (applicable for for-profit corporations only), whether the board member receives any compensation from the agency, and whether the board member can be considered independent. "Independent" board members include individuals (1) who are not compensated by the organization as an employee or independent contractor; (2) whose compensation is not determined by individuals who are compensated by the organization; (3) who do not receive, directly or indirectly, material financial benefits from the organization except as a member of the charitable class served by the organization; and (4) who are not related to (as a spouse, sibling, parent or child), or do not reside with, any individual described above.

In addition, a resume must be submitted for each board member. The resume should include the board member's name, education and experience but should exclude identifying information such as social security numbers, addresses, D.O.B and marital status.

Board Member Name*	Title	Term	% Ownership	Amount of Distributions/ Dividends (\$)	Compensated? (Yes/No)	Independent? (Yes/No)	Resume Attached*
Pamela Klein	President	12/31/16	0	0	No	Yes	✓
Sheree Dallas-Branch	Vice President	12/31/17	0	0	No	Yes	✓
Ryan House	Secretary	12/31/17	0	0	No	Yes	✓
Sandra Samse	Treasurer	12/31/18	0	0	No	Yes	✓
Timothy Charek	Member	12/31/16					
Anne DeLeo	Member	12/31/15	0	0	No	Yes	✓
Valerie Gabriel	Member	12/31/15	0	0	No	Yes	✓
Stephen Hargarten	Member	12/31/15	0	0	No	Yes	✓
Betsy Hoylman	Member	12/31/15	0	0	No	Yes	✓
Sharon Jordan	Member	12/31/17	0	0	No	Yes	✓
Jim Lietdtke	Member	12/31/17	0	0	No	Yes	✓
Maria Lopez Vento	Member	12/31/15	0	0	No	Yes	✓
Tom Salemy	Member	12/31/17	0	0	No	Yes	✓
Esther Shin	Member	12/31/15	0	0	No	Yes	✓
Thelma Sias	Member	12/31/16	0	0	No	Yes	✓
Kate Venne	Member	12/31/17	0	0	No	Yes	✓
Jodi Wire	Member	12/31/16	0	0	No	Yes	✓

*Resumes are included in Attachment A.

Are positions of Agency Head (e.g. President, Chief Executive Officer, Executive Director, etc.), Board Chair, and Treasurer held by separate individuals?

- Yes
 No

If agency is a non-profit corporation with fewer than five board members, explain the rationale for the number of board members, and indicate what, if any, compensatory controls are in place to mitigate self-dealing and other potential abuses by the Board.

Board Committees/ Advisory Committee

Committee Name	Committee Purpose
Executive	Oversight and planning of Board activities
Finance	Budget monitoring and accountability
Strategic Planning	Program planning and review, recruitment, retention of Board membership
Advancement	Private fund development and special events

The Board of Directors' 2015 meetings for the agency will be held on the following dates:

January	N/A	May	N/A	September	9/6
February	2/18	June	6/17	October	N/A
March	N/A	July	N/A	November	11/18
April	4/22	August	N/A	December	(Annual Mtg. date TBD)

Contractor agrees to retain Board of Directors' meeting minutes for a period of at least four (4) years following contract termination and agrees to provide Milwaukee DHHS access to the meeting minutes upon request.

Authorized Signature:  Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

YEAR 2015 AGENCY OWNERS/STOCKHOLDERS/OFFICERS

(applicable to all organizations)

Please list each agency owner, stockholder, officer, LLC manager, Partner, and/or LLC member, and indicate the office title and total compensation. For Non-profits this will include names of officers appointed by the Board (such as COO or CEO). In addition, for For-profit organizations also provide the percentage of ownership interest, amount of prior year's distributions or dividends from the agency during the prior year. Please note that only those stockholders holding twenty percent or greater interest must be listed. Volunteer board members with no ownership stake or compensation need not be listed here (but should be listed on Item 6). **This Item applies to both For-profit and Non-profit agencies.**

Name	Status	Office Title	% Ownership	Amount of Distributions/ Dividends (\$)	Total Compensation (\$)*
Andrea Mallmann-Elliott	<input type="checkbox"/> Stockholder/Owner/LLC Member/ Partner (for profit only) <input type="checkbox"/> Officer/LLC Manager (for profit only) <input checked="" type="checkbox"/> Officer (non profit only)	Chief Executive Officer	0%	\$0	\$87,500
	<input type="checkbox"/> Stockholder/Owner/LLC Member/ Partner (for profit only) <input type="checkbox"/> Officer/LLC Manager (for profit only) <input type="checkbox"/> Officer (non profit only)				
	<input type="checkbox"/> Stockholder/Owner/LLC Member/ Partner (for profit only) <input type="checkbox"/> Officer/LLC Manager (for profit only) <input type="checkbox"/> Officer (non profit only)				
	<input type="checkbox"/> Stockholder/Owner/LLC Member/ Partner (for profit only) <input type="checkbox"/> Officer/LLC Manager (for profit only) <input type="checkbox"/> Officer (non profit only)				

*Total Compensation should reflect amount reported on IRS Form W-2 and 1099.

Authorized Signature:  Date: **March 20th, 2015**

Printed Name: **Andrea Mallmann-Elliott** Title: **Chief Executive Officer**

Agency: **Community Advocates, Inc.**

YEAR 2015 AGENCY MISSION STATEMENT

Agency: **Community Advocates, Inc.**

Agency's Mission Statement

The mission of Community Advocates is to provide individuals and families with advocacy and services to meet their basic needs so they may live in dignity.

Before application for any new program, project or, especially, when negotiating mergers or program transfer from other agencies, Community Advocates Executive staff and its Board of Directors are charged with considering whether the program and/or agency goals are consistent with and adhere to our mission.

Community Advocates was established to advocate for those who lacked the basic needs and the wherewithal to establish necessary self-sufficiency.

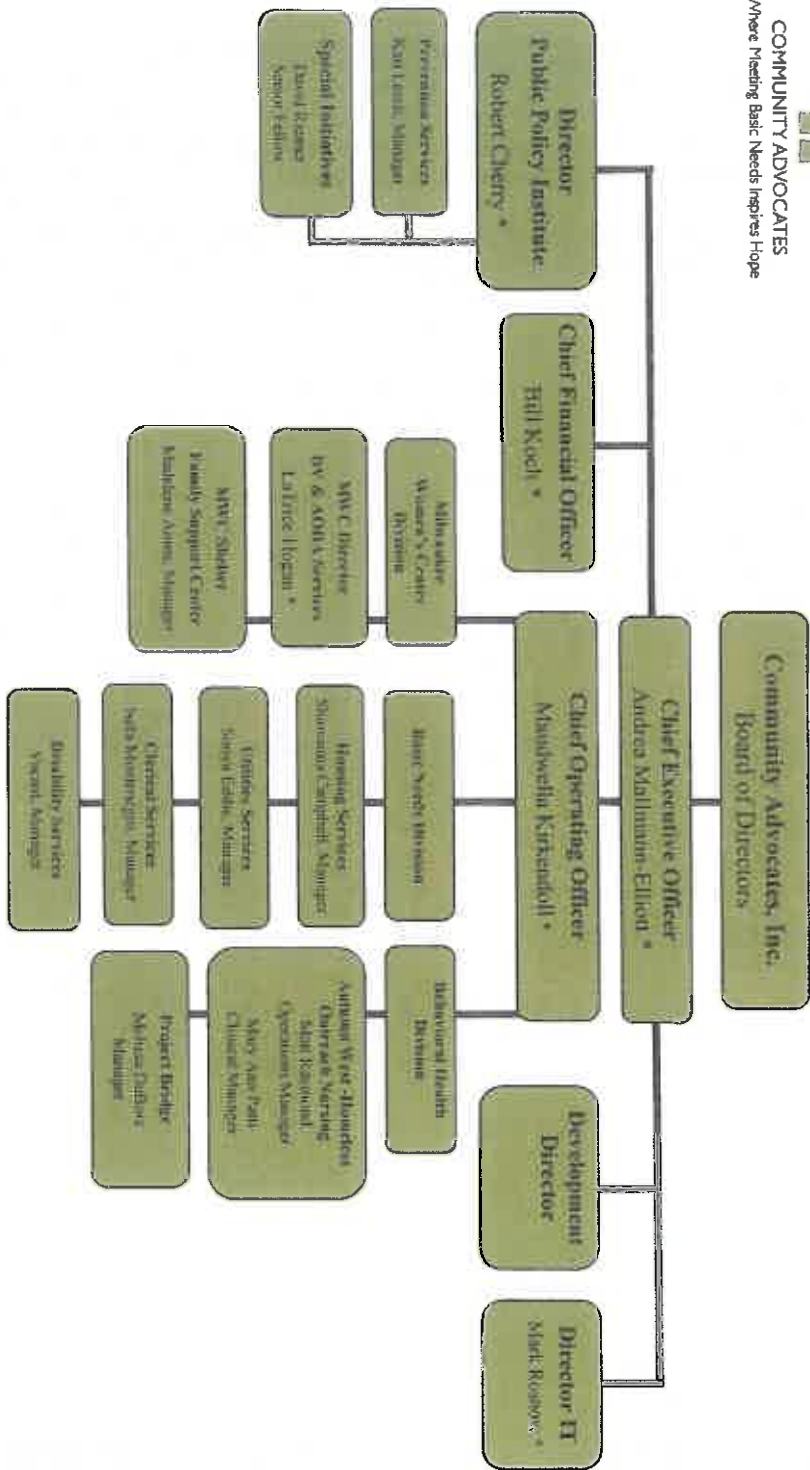
To this end, Community Advocates provides advocacy and administers supportive programs to encourage and assist individuals and families to position themselves to move beyond our basic needs focus to pursue life-enhancing educational, employment and family-strengthening goals in a healthy, safe environment.

Community Advocates organizational focus moves in lock step with programs, such as WHEAP, that are fundamentally instrumental in providing our clients with necessary safety net services and the essential skills needed to accomplish this goal.



COMMUNITY ADVOCATES
Where Meeting Basic Needs Inspires Hope

COMMUNITY ADVOCATES Organizational Chart



* Executive Team

AGENCY LICENSES AND CERTIFICATIONS

Community Advocates, Inc. provides advocacy services, which do not require any particular licenses or certifications by any governmental body.

The agency is appropriately registered with the Federal and State agencies that regulate community-based non-profit organizations.

YEAR 2015 INDEMNITY, DATA & INFORMATION
SYSTEMS COMPLIANCE, HIPAA

ITEM # 11

Indemnity/Insurance

Contractor agrees to the fullest extent permitted by law, to indemnify, defend and hold harmless, the County and its agents, officers and employees, from and against all loss or expense including costs and attorney's fees by reason of liability for damages including suits at law or in equity, caused by any wrongful, intentional, or negligent act or omission of the Contractor, or its (their) agents which may arise out of or are connected with the activities covered by this agreement.

Contractor shall indemnify and save County harmless from any award of damages and costs against County for any action based on U.S. patent or copyright infringement regarding computer programs involved in the performance of the tasks and services covered by this agreement.

Provision for Data and Information Systems Compliance

Contractor shall utilize computer applications in compliance with County standards in maintaining program data related to the contract, or bear full responsibility for the cost of converting program data into formats useable by County applications. All Contractors shall have internet access, an email address, and shall utilize Microsoft Excel 2000 or newer, or shall use applications which are exportable/convertible to Excel.

Health Insurance Portability and Accountability Act

The contractor agrees to comply with the federal regulations implementing the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to the extent those regulations apply to the services the contractor provides or purchases with funds provided under this contract.

Authorized Signature:  Date: **March 20th, 2015**

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

YEAR 2015 RELATED PARTY DISCLOSURES

ITEM # 13

Milwaukee County Employee

Submit a list of any Milwaukee County employee, or former County employee to whom your agency paid a wage, salary, or independent contractor fee during the preceding three-year period. Include payments made during 2012, 2013, and 2014 to any person who was at the time of payment, also employed by Milwaukee County.

Employee	2012 Wages	2013 Wages	2014 Wages

No employment relationship with current or former Milwaukee County employees (within 3 years) exists.

Related Party Relationships

The agency rents from or contracts with a person who has ownership or employment interest in the agency; serves on the Board of Directors; or is a member of the immediate family of an owner, officer, employee, or board member? Yes No

If such a relationship exists, submit a copy of lease agreements, certified appraisals, and contract agreements, etc.

Submit a full disclosure of the relationship, including the extent of interest and amount of estimated income anticipated from each source, for each individual if any board member, stockholder, owner, officer, or member of the immediate family of any board member, stockholder, owner or officer, holds interest in firms or serves on the board from which materials or services are purchased by the agency, its subsidiaries, or affiliates. "Immediate family" means an individual's spouse or an individual's relative by marriage, lineal descent, or adoption who receives, directly or indirectly, more than one-half of his/her support directly from the individual or from whom the individual receives, directly or indirectly, more than one-half of his/her support.

Name	Relationship	% or Estimated Income

Authorized Signature: Andrea Mallmann-Elliott Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

FORM 2C - YEAR 2015 EMPLOYEE HOURS - RELATED ORGANIZATION DISCLOSURE

For each employee of your agency who works for more than one related organization which may or may not be under contract to Milwaukee County, the total number of weekly hours scheduled for each affiliated corporate or business enterprise must be accounted for by program/activity.

"Related Organization" is defined as an organization with a board, management, and/or ownership which is (are) shared with the Proposer organization.

Employee Name	Related Organization/ Employer	Program/Activity	Total Weekly Hours

Please check the statement below, sign and date the form if the above condition does not exist.

No employee of the agency works for more than one related organization that may or may not be under contract to Milwaukee County.

Authorized Signature: *Andrea Mallmann-Elliott* Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

Interest in Contract

No officer, employee or agent of the County who exercises any functions or responsibilities with carrying out any services or requirements to which this contract pertains has any personal interest, direct or indirect, in this contract.

Interest of Other Public Officials

No member of the governing body of a locality, County or State and no other public official of such locality, County or State who exercises any functions or responsibilities in the review or approval of the carrying out of this contract has any personal interest, direct or indirect, in this contract.

Contractor covenants s/he presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services under this contract. Any conflict of interest on the part of the Contractor will be disclosed to the County. In the event Contractor has a conflict of interest that does not permit Contractor to perform the services under the contract with respect to any client or recipient, Contractor will notify the County and will provide the County with all records and reports relating to same.

Prohibited Practices

Contractor attests that it is familiar with Milwaukee County's Code of Ethics, Chapter 9 of Milwaukee County Code of General Ordinances, which states in part, "No person may offer to give any County officer or employee or his immediate family, or no County officer or employee or his immediate family may solicit or receive anything of value pursuant to an understanding that such officer's or employee's vote, official action, or judgment would be influenced thereby."

Said chapter further states, "No person(s) with a personal financial interest in the approval or denial of a contract being considered by a County department or with an agency funded and regulated by a County department, may make a campaign contribution to any candidate for an elected County office that has final authority during its consideration. Contract considerations shall begin when a contract is submitted directly to a County department or to an agency until the contract has reached its final disposition, including adoption, county executive action, proceedings on veto (if necessary) or departmental approval."

Where Agency intends to meet its obligations under this or any part of this RFP through a subcontract with another entity, Agency shall first obtain the written permission of County; and further, Agency shall ensure it requires of its subcontractors the same obligations incurred by Agency under this RFP.

Authorized Signature: Andrea Mallmann-Elliott Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

In accordance with Section 56.17 of the Milwaukee County General Ordinances and Title 41 of the Code of Federal Regulations, Chapter 60, SELLER or SUCCESSFUL BIDDER or CONTRACTOR or LESSEE or (Other-specify), (Hence forth referred to as "VENDOR) certifies to Milwaukee County as to the following and agrees that the terms of this certificate are hereby incorporated by reference into any contract awarded.

Non-Discrimination

Community Advocates, Inc. certifies that it will not discriminate against any employee or applicant for employment because of race, color, national origin, or ancestry, age, sex, sexual orientation, gender identity and gender expression, disability, marital status, family status, lawful source of income, or status as a victim of domestic abuse, sexual assault or stalking, which includes but is not limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeship.

Community Advocates, Inc. will post in conspicuous places, available to its employees, notices to be provided by the County setting forth the provision of the non-discriminatory clause.

A violation of this provision shall be sufficient cause for the County to terminate the contract without liability for the uncompleted portion or for any materials or services purchased or paid for by the contractor for use in completing the contract.

Affirmative Action Program

Community Advocates, Inc. certifies that it will strive to implement the principles of equal employment opportunity through an effective affirmative action program, which shall have as its objective to increase the utilization of women, minorities, and disabled persons and other protected groups, at all levels of employment in all divisions of the vendor's work force, where these groups may have been previously under-utilized and under-represented.

Community Advocates, Inc. also agrees that in the event of any dispute as to compliance with the afore-stated requirements, it shall be his responsibility to show that he has met all such requirements.

Non-Segregated Facilities

Community Advocates, Inc. certifies that it does not and will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not permit its employees to perform their services at any location under its control, where segregated facilities are maintained.

Subcontractors

Community Advocates, Inc. certifies that it has obtained or will obtain certifications regarding non-discrimination, affirmative action program and non-segregated facilities from proposed subcontractors that are directly related to any contracts with Milwaukee County, if any, prior to the award of any subcontracts, and that it will retain such certifications in its files.

Reporting Requirement

Where applicable, VENDOR certifies that it will comply with all reporting requirements and procedures established in Title 41 Code of Federal Regulations, Chapter 60.

Affirmative Action Plan

Community Advocates, Inc. certifies that, if it has 50 or more employees, it will develop and/or update and submit (within 120 days of contract award) an Affirmative Action Plan to: Mr. Paul Grant, Audit Compliance Manager, Milwaukee County Department of Audit, 2711 West Wells Street 9th Floor, Milwaukee, WI 53208 [Telephone No.: (414) 278-4292].

Community Advocates, Inc. certifies that, if it has 50 or more employees, it has filed or will develop and submit (within 120 days of contract award) for each of its establishments a written affirmative action plan. Current Affirmative Action plans, if required, must be filed with any of the following: The Office of Federal Contract Compliance Programs or the State of Wisconsin, or the Milwaukee County Department of Audit, 2711 West Wells Street, Milwaukee, WI 53208 [Telephone No.: (414) 278-4292].

If a current plan has been filed, indicate where filed State of Wisconsin Department of Health Services and the years covered 2014-2017.

Community Advocates, Inc. will also require its lower-tier subcontractors who have 50 or more employees to establish similar written affirmative action plans.

Employees

Community Advocates, Inc. VENDOR certifies that it has 110 employees in the Standard Metropolitan Statistical Area (Counties of Milwaukee, Waukesha, Ozaukee and Washington, Wisconsin) and 110 employees in total.

Compliance

Community Advocates, Inc. certifies that it is not currently in receipt of any outstanding letters of deficiencies, show cause, probable cause, or other notification of noncompliance with EEO regulations.

Executed this 20th day of March, 2015 by: Firm Name Community Advocates, Inc.


(Signature) Address: 728 N. James Lovell Street

Title: Chief Executive Officer

City/State/Zip: Milwaukee, WI 53233

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YEAR 2015 EQUAL OPPORTUNITY POLICY

ITEM # 17

Community Advocates, Inc. is in compliance with the equal opportunity policy and standards of all applicable Federal and State rules and regulations regarding nondiscrimination in employment and service delivery.

EMPLOYMENT - AFFIRMATIVE ACTION & CIVIL RIGHTS

It is the official policy of **Community Advocates, Inc.** that no otherwise qualified person shall be excluded from employment, be denied the benefits of employment or otherwise be subjected to discrimination in employment in any manner on the basis of age, race, religion, color, sex, national origin or ancestry, handicap, physical condition, developmental disability, arrest or conviction record, sexual orientation, military/veteran status or military participation. We pledge that we shall comply with Affirmative Action and Civil Rights standards to ensure that applicants are employed and that employees are treated during their employment without regard to the above named characteristics. Such action shall include but not be limited to the following: employment, upgrading, demotion, transfer, recruitment, or recruitment advertising, layoff or termination, rates of pay or other forms of compensation and selection for training including apprenticeship.

Community Advocates, Inc. has a written Affirmative Action Plan which includes a process by which discrimination complaints may be heard and resolved.

SERVICE DELIVERY - CIVIL RIGHTS

It is the official policy of **Community Advocates, Inc.** that no otherwise qualified applicant for services or service recipient shall be excluded from participation, be denied benefits or otherwise be subjected to discrimination in any manner on the basis of age, race, religion, color, sex, national origin or ancestry, handicap, physical condition, developmental disability, arrest or conviction record, sexual orientation, military/veteran status or military participation. We pledge that we shall comply with civil rights laws to ensure equal opportunity for access to service delivery and treatment without regard to the above named characteristics. **Community Advocates, Inc.** has a written Civil Rights Action Plan which includes a process by which discrimination complaints may be heard and resolved.

All officials and employees of **Community Advocates, Inc.** are informed of this statement of policy. Decisions regarding employment and service delivery shall be made to further the principles of affirmative action and civil rights.

To ensure compliance with all applicable Federal and State rules and regulations regarding Equal Opportunity and nondiscrimination in employment and service delivery, **Jeffery Roman** has been designated as our Equal Opportunity Coordinator. Any perceived discrimination issues regarding employment or service delivery shall be discussed with **Mr. Roman**. **Mr. Roman** may be reached during week days at **(414) 270-6959**.

A copy of the Affirmative Action Plan and/or the Civil Rights Action Plan including the process by which discrimination complaints may be heard and resolved is available upon request.

Andrea Mallmann-Elliott Chief Executive Officer March 20th, 2015
(Director or Chief Officer) (Title) (Date)

This Policy Statement shall be posted in a conspicuous location.

Audit Services Division Hotline

ITEM # 18


Milwaukee County has set up the Audit Services Division Hotline to be the primary conduit for concerned employees, citizens, and contractors to communicate allegations of fraud, waste and abuse involving County government. Milwaukee County's resolution states, in part,

"all department heads and administrators of Milwaukee County are hereby directed to provide information regarding Milwaukee County Audit Services Division Fraud Hotline to all professional service and construction contractors when they commence work for Milwaukee County and, further, that instructions and bulletins shall be provided to said contractors that they post this information in a location where their employees will have access to it and provide said information to any and all subcontractors that they may retain; and

...Milwaukee County funded construction and work sites shall also have posted the bulletin that the Audit Services Division has developed which provides the Fraud Hotline number and other information and the Department of Public Works shall inform contractors of this requirement"

A Hotline bulletin is attached (See flyer under Appendices). Please distribute the revised bulletin to contractors as contracts are let or renewed and also post it prominently at all County employee work locations associated with your organization.

This certifies that the copies of Audit Hotline poster will be posted at prominent locations within our organization upon effective date of awarded contract.

Authorized Signature:  Date: March 20th, 2015
Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer
Agency: Community Advocates, Inc.

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CERTIFICATION STATEMENT

DEBARMENT AND SUSPENSION

The Proposer certifies to the best of its knowledge and belief, that the corporation, LLC, partnership, or sole proprietor, and/or its' principals, owners, officers, shareholders, key employees, directors and member partners: (1) are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; (2) have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; (3) are not presently indicted for or otherwise criminally charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in (2) of this certification; and, (4) have not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

Authorized Signature: *Andrea Mallmann-Elliott* Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

ADDITIONAL DISCLOSURES

ITEM # 20

Has your organization or any representative, owner, partner or officer ever failed to perform work awarded or had a contract terminated for failure to perform or for providing unsatisfactory service?

Yes No If yes, on a separate page please provide a detailed explanation.

- 2. Within the past five (5) years, has your organization or any representative, owner, partner or officer (collectively "your Company") ever been a party to any court or administrative proceedings or disciplinary action, where the violation of any local, state or federal statute, ordinance, rules, regulation, or serious violation of company work rules by your Company was alleged?

Yes No If yes, on a separate page, please provide a detailed explanation outlining the following:

- o Date of citation or violation
- o Description of violation
- o Parties involved
- o Current status of citation

- 3. Within the past 5 years has your organization had any reported findings on an annual independent audit?

Yes No If yes, on a separate page please provide a detailed explanation.

Within the past 5 years, has your organization been required to submit a corrective action plan by virtue of review or audit by independent auditor, or any governmental agency or purchaser of services?

Yes No If yes, on a separate page please provide a detailed explanation including if the corrective action has been accepted by the purchasing agency and completely implemented? If not, please explain remaining action required by purchasing agency.

- 5. Have you, any principals, owners, partners, shareholders, directors, members or officers of your business entity ever been convicted of, or pleaded guilty, or no contest to, a felony, serious or gross misdemeanor, or any crime or municipal violation, involving dishonesty, assault, sexual misconduct or abuse, or abuse of controlled substances or alcohol, or are charges pending against you or any of the above persons for any such crimes by information, indictment or otherwise?

Yes No If yes, on a separate page, please provide a detailed explanation.

Authorized Signature: Andrea Mallmann-Elliott Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

CERTIFICATION STATEMENT

ITEM# 21

RESOLUTION REGARDING FILE 99-233 REQUIRING BACKGROUND CHECKS
FOR AGENCIES SERVING CHILDREN AND YOUTH

This is to certify that Community Advocates, Inc.
(Name of Agency/Organization)

- (1) has received and read the enclosed, "PROVISIONS OF RESOLUTION REQUIRING BACKGROUND CHECKS ON DEPARTMENT OF HUMAN SERVICES CONTRACT AGENCY EMPLOYEES PROVIDING DIRECT CARE AND SERVICES TO MILWAUKEE COUNTY CHILDREN AND YOUTH;"
- (2) has a written screening process in place to ensure background checks on criminal and gang activity for current and prospective employees providing direct care and services to children and youth; and,
- (3) is in compliance with the provisions of File No. 99-233, the Resolution requiring background checks.

Authorized Signature: *Andrea Mallmann-Elliott* Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

CERTIFICATION STATEMENT

RESOLUTION REGARDING CAREGIVER AND CRIMINAL BACKGROUND CHECKS

(Applies to all agencies with employees who meet the definition of "caregiver", per definition below)

Contract agencies and agencies with which the DHHS has reimbursable agreements shall certify, by written statement, that they will comply with the provisions of ss.50.065 and ss.146.40 Wis. Stats. and DHS 12 and DHS13, Wis. Admin. Code *State of Wisconsin Caregiver Program* (all are online at <http://www.legis.state.wi.us/rsb/code.htm>). Agencies under contract shall conduct background checks at their own expense.

DEFINITION: EMPLOYEES AS CAREGIVERS (Wisconsin Caregiver Program Manual, <http://dhfs.wisconsin.gov/caregiver/pdffiles/Chap2-CaregiverBC.pdf>)

A caregiver is a person who meets all of the following:

- is employed by or under contract with an entity;
- has regular, direct contact with the entity's clients or the personal property of the clients; and
- is under the entity's control.

This includes employees who provide direct care and may also include Housekeeping, maintenance, dietary and administrative staff, if those persons are under the entity's control and have regular, direct contact with clients served by the entity.

This is to certify that Community Advocates, Inc.
(Name of Agency/Organization)

is in compliance with the provisions of ss.50.065 and ss.146.40 Wis. Stats. and DHS 12 and DHS 13, Wis. Admin. Code *State of Wisconsin Caregiver Program*

Authorized Signature:  Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

Item 23 partially comprises the points scored under Cultural Diversity and Cultural Competence

CULTURAL COMPETENCE

ITEM # 23

Describe your proposed strategy for developing and maintaining Cultural Competence. Apart from having a culturally diverse board and or staff, please provide specific examples of existing and/or proposed policies, procedures, and other practices promoting Cultural Competence. A defining characteristic of Cultural Humility is client centered care. Proposers should describe their client centered approach specifically in terms of how it incorporates Cultural Humility.

Agency Activity and Practice to Foster Cultural Competence

Community Advocates, Inc. has consistently worked on the development of cultural diversity and cultural competence throughout its thirty-nine year history. Among significant achievements toward this end are the following:

- All employees of Community Advocates are required to attend Civil Rights Compliance training within the first year of employment and training updates as scheduled. Training dates for 2015 will be established and all employees received training in 2011 - 2013.
- Staff and Management participate in informal cultural awareness presentations which are developed and presented by a staff committees led by minority staff members. These are usually presented in conjunction with national "awareness" days or in conjunction with ethnic holidays. For several years, staff has organized agency-wide Cinco de Mayo presentations that celebrate Mexican heritage and pride. During Black History Month, staff presenters recount stories and provide biographical sketches of notable African Americans who have influenced or changed the course of U.S. history.
- Instruction on cultural competence is included in and mandatory for annual staff training. Community Advocates provides a 15-hour Cultural Diversity training "Unlearning Racism: Tools for Action" for its staff developed specifically for the agency by the YWCA. CA staff, in groups of 25, attend five 3-hour sessions to include topics such as *The Impact of Racism*, *Understanding the Roots of Racism*, and *Your Role in Addressing Racism*.
- Management and selected staff are also directed to attend or have the opportunity to attend local and out of town/state advanced trainings specific to their areas of expertise that focus on cultural issues affecting the responsibilities and concerns of managers and administrators. For example, a manager from our Project Bridge case management program attended the Housing First Partners' Conference in New Orleans. Included were culturally relevant topics addressing program theory and resulting logic model for an innovative model of ethno-racial intensive case

management and cultural competence issues specific to working with homeless populations.

- **Community Advocates** conducts an annual full-day Customer Service Session training for front line staff who are in constant contact with clients, other agency/organization personnel and with the public. A portion of this training specifically is geared to increase the coping and interpersonal skills required in the occasionally stressful profession of social service provision. Training in this area is ongoing and responsive to current experiences in the agency.
- **Community Advocates' Management** continues to update and renew an affirmative action strategy which has made the agency a strong and valued entity within all ethnic communities. All required information is clearly addressed in the plan. Framed copies of pertinent documents are posted in a highly trafficked, visible area within our lobby in accordance with our affirmative action plan

EMERGENCY MANAGEMENT PLAN

**Community Advocates, Inc.
728 North James Lovell
Milwaukee, WI 53233-2408**

Community Advocates' main program location, 728 North James Lovell, is primarily a site to which individuals seeking assistance walk in or call during normal business hours of 9 a.m. – 5 p.m., Monday through Friday. The Emergency Management Plan includes evacuation of the facility, closure of the facility, implementation of emergency staffing levels, and reallocation of facility resources as a staging site for the City and County of Milwaukee. Below is the chain of command of Executive Staff at Community Advocates authorized to execute the Emergency Management Plan in the event of a weather-related natural disaster or a fire. A hard copy of this plan will be kept at each CA satellite location and each Emergency Management Plan Team member will have a copy at their home. Testing of the Emergency Management Plan will be completed every two years, outcomes of those tests will be maintained and used to make adjustments to the plan as needed.

Andi Mallmann- Elliott
Maudwella Kirkendoll
Bill Koch
Mark Rosnow

Chief Executive Officer, 414.517.6718
Chief Operating Officer, 414.699.6820
Chief Financial Officer, 414.336.8737
Information Solutions Director, 414.688.1359

The following procedures will be implemented if hazards or disasters occur during normal hours of operation.

Fire

Community Advocates, Inc. consists of four (4) floors including the basement. The building is equipped with an automatic sprinkler system installed in the ceiling, manual pull stations and fire alarms with strobe lights. The building is equipped with pull stations and heat/smoke detectors. The pull stations are located at the entrance to the east and west stairwells on each floor. There are heat/smoke detectors on each floor. The Fire Alarm Panel is located outside the elevator lobby on the first floor. The building's heat/smoke alarm system is monitored by SimplexGrinnell, 262.781.1710. Each exit is equipped with an electric exit sign and hallway emergency lighting. There are four (4) wall-mounted multipurpose, dry chemical portable fire extinguishers on each floor.

In the event of a fire:

1. **Go to the nearest fire alarm pull station and pull it** – Immediately notify the staff and customers that they must quickly and calmly evacuate the building. Go to the nearest exit **away from the fire** and evacuate the building. **Do not use the elevator.**
2. **Call 911** At this time provide the dispatcher with the following:
 - a. **Name of the Facility:** Community Advocates, Inc.
 - b. **Address of Facility:** 728 N. James Lovell Street
 - c. **Name of Caller**
 - d. **Situation:** Tell the dispatcher if there are injuries, the size of the fire, or other pertinent information.

If the alarm does not sound:

- a. Inform your supervisor of the situation.
 - b. Have everyone begin to evacuate the building calmly.
3. **Assemble in the south parking lot** - In the event of a fire emergency that requires evacuation of the building, all employees, volunteers, and customers should assemble in the south parking lot.
 4. **Perform a roll-call** – A current list of employees by floor will be kept at the entrance to each stairwell. Two Fire Emergency Team leads will be designated on each floor. Emergency Team leads will take the employee list as they exit the building and will perform a floor roll-call. First floor Fire Emergency Team leads will also bring the customer sign in sheet and will perform a customer roll call.
 5. **Stay where you are** – Do not leave your assembly area unless a member of your Floor Emergency Team has cleared you to do so.
 6. **Can the fire be put out?** – In the event that the fire is in the incipient stage (just starting; very small) the Fire Emergency Team lead should assess the situation and use a portable fire extinguisher to control the fire.

Tornado

1. Lead staff will monitor National Weather Service alerts via the NOAA weather radio.
2. Lead staff on each floor will alert client and staff of the need to evacuate.
3. Evacuate clients and employees on each floor using safe evacuation route (front fire-safe stairwell or back fire-safe stairwell) to the basement.
4. Once in the shelter, personnel should protect their heads with their arms and crouch down.
5. Continue to monitor the National Weather Service alerts via the NOAA weather radio.

Flood

1. Lead staff will monitor National Weather Service alerts via the NOAA weather radio.
2. Lead staff on each floor will alert client and staff of the need to evacuate.
3. Evacuate clients and employees on each floor using safe evacuation route (front fire-safe stairwell or back fire-safe stairwell) to the main multi-purpose room on the 2nd floor.
4. Continue to monitor the National Weather Service alerts via the NOAA weather radio.

Blizzard

1. Lead staff will monitor National Weather Service alerts via the NOAA weather radio.
2. Lead staff will determine when to close facility based on storm severity and in the interest of client and employee safety.
3. Lead staff will advise clients and employees of closure due to weather conditions.
4. Lead staff will contact local television stations to post agency closure due to weather conditions.

The following procedures will be implemented if hazards or disasters occur outside of normal hours of operation.

Blizzard

1. Lead staff will monitor National Weather Service alerts via the local television/radio coverage.
2. Lead staff will determine when to close facility based on storm severity and in the interest of client and employee safety.
3. Lead staff will contact local television stations to post agency closure due to weather conditions.
4. Outgoing message on main phone number will alert employees and clients of facility closure.

Emergency Supply List

The follow is a list of supplies will be maintained at 728 N. James Lovell in case of emergency or disaster situations.

- NOAA weather radio and extra batteries
- Battery-powered commercial radio and extra batteries
- A waterproof, fireproof portable container with building plans, insurance policies, employee contact and identification information, vendor contact names and numbers, and law enforcement contact information.
- Water
- Food, at least a three-day supply of non-perishable food
- Flashlight and extra batteries
- First Aid kit
- Whistle to signal for help
- Dust masks
- Moist towelettes for sanitation
- Toolbox including wrench or pliers to turn off utilities
- Can opener
- Plastic sheeting and duct tape
- Garbage bags and plastic ties for personal sanitation
- Blankets

Community Advocates

Overview of MS SQL Database Reliability and Security Practices and Measures

Physical Security

The SQL databases are virtualized on Dell PowerEdge R710 secured by Windows authentication accounts and complex passwords. The devices are housed in a climate controlled locked room with access limited to IT personnel. The server room is located in a building with 24/7 electronic security system with motion detectors, heat indicators

and fire and water sensors. Camera and monitors augment the electronic motion detecting system.

Data Backup

Servers at Community Advocates are backed up daily, both locally and offsite. The SQL data is backed up and stored in encrypted form to disk on a daily (held for 14 days) basis. The local backups consist of daily VM snapshots to provide quick recovery. In addition, there are weekly and monthly snapshots of SQL data held for three months. These backup devices are off-site, located in secure facilities.

Server Environment

The server environment consists of 3 ESX servers connected to direct attached storage. The direct attached storage consists of 2 RAID5 arrays with hot spares to provide quick recovery of a failed disk. The warranty on the RAID array is next business day, replacement drives arrive quickly. In case of failure on one of the ESX servers the residing virtual machines are easily and quickly moved to one or more live ESX servers for failover support until the server is repaired. Security patching is done on a monthly basis. The MSSQL server is backed up and maintain in the same manner as the rest of the servers.

SQL Accounts

The SQL administrative account, which uses a complex password, is accessible by a limited number of IT personnel. User accounts, also using complex passwords, enable access to specific databases and operations within these databases.

Monitoring

Login auditing is enabled at both the operating system and SQL levels. The logs are regularly evaluated to determine trends in intrusion attacks.

MS Updates

Service packs and security patches are installed as soon as released by Microsoft and evaluated by IT staff.

User Data Manipulation

Database structures are hidden from client applications by the use of stored procedures to perform select, insert, update, and delete operations. Database information is transmitted to and from client applications via SSL.

Unnecessary Features are limited

For security reasons, the following SQL features have not been implemented: Web Assistant, OLE Automation, xp_CmdShell, and xp_SendMail.

Client Applications

Client applications are secured by accounts having moderate to complex passwords requirements. Client user accounts expire every 60 days. The IP addresses of anyone

logging into a client application is recorded and retained indefinitely. Database record manipulation (insert, update) is tracked by the logged in user's session id and account.

Critical Computer Applications

Operating System – Windows 7

Program Applications

Cache Cleaner 6.5.0

Host Checker

Kaspersky Anti-Virus 6.0 for Windows Workstations MP4

Microsoft Office 2010

Microsoft SharePoint Workspace 2010

PDF Creator

QuickBooks Pro

Sage Fund Accounting

Windows Secure Application Manager

Community Advocates Business Restoration Plan

In the event that a disaster results in a significant disruption of Community Advocates main office location, 728 N. James Lovell Street the following steps will be taken to restore business operations. The Autumn West Safe Haven located at 3410 W. Lisbon Avenue will be hub for business operations restoration and serve as a satellite site. Emergency Management Team members listed below will meet at Autumn West within an hour of notification of a disaster.

Andi Mallmann- Elliott

Chief Executive Officer, 414.517.6718

Maudwella Kirkendoll

Chief Operating Officer, 414.699.6820

Bill Koch

Chief Financial Officer, 414.336.8737

Mark Rosnow

Solutions Director, 414.688.1359

1. Assessment of facility and declaration of emergency.
 - a. Team members will tour the facility to assess damage.
 - b. CEO will declare an Emergency and initiate the Business Restoration Plan.
2. Team Members will commence Business Restoration Plan including:
 - a. Communications
 - b. Satellite sites
 - c. Lovell site re-opening
3. Communications – throughout the process of declaration of emergency, establishment of operations at satellite sites to Lovell site re-opening each team member will be responsible for communicating with the following stakeholder groups. This communication will happen by telephone. The attached lists will be kept by each responsible team member in an offsite location. It will be updated as necessary.

- a. CEO – Division Directors/Employees, government contacts, media & contract contact
 - b. COO – Utilities & essential services restoration services & furniture coordination
 - c. Information Solutions Director – IT Solutions & Equipment
4. Satellite sites - Community Advocates currently has two satellite sites in addition to Autumn West that can be used as temporary satellite sites. These sites are located at 4906 W. Fond du Lac Avenue and 2511 W. Vine.
- a. Information Solutions Director
 - i. Restore server back up to server located at Autumn West
 - ii. Secure temporary hardware solutions for employees at satellite locations.
 - b. COO
 - i. Contact post office to hold all incoming mail at 53233-area post office while satellite sites are set up
 - ii. Redirect all incoming mail to Administrative satellite site.
 - iii. Redirect Lovell Street telecommunications and internet services to satellite sites, key contact – Patsy Reichert, Technology Management Solutions, 414.975.3529
 - iv. Secure telecommunications equipment, key contact – Chis Haig, Comnet, 262.783.5400
 - v. Secure additional equipment i.e. copiers, postage machines, etc. for satellite sites, key contact – Nic Pal, James Imaging, 262.781.7700
 - vi. Set up additional offices with furniture currently in storage
 - vii. Secure additional furniture as needed.
 - viii. Serve as point of contact for Lovell Street restoration, key contact – Damage Control, Inc., 414.672.3409
 - c. CEO
 - i. Inform Division Directors of satellite site locations for employees
 - 1. 4906 W. Fond du Lac Avenue
 - a. Housing
 - b. Energy Services
 - c. Medicaid Outreach
 - d. Disability Services
 - 2. 2511 W. Vine
 - a. Addiction & Mental Health Services
 - b. Accounting & Administration
 - 3. 3400 W. Lisbon
 - a. Protective Payee
 - b. Permanent Supportive Housing
 - ii. Establish reception and clerical resources at satellite sites
 - iii. Inform media and contract contact persons of redirected services at each satellite site.
 - iv. Inform 211 of satellite sites for client services

5. Accounting/Financial Functions - Community Advocates accounting and financial functions will be relocated to the satellite site located at 2511 W. Vine. Additionally, Community Advocates also has a contractual relationship with Ritz-Holman LLP, a full service accounting firm specializing in non-profit accounting, to provide quarterly fiscal reviews, consulting services and to serve as an interim accounting department if needed. Ritz-Holman LLP maintains secure access to Community Advocates' SAGE financial data file and will provide office space and computers with SAGE software for the accounting department while the satellite site is being set up. CFO or designee and IT Support will take the following steps to ensure a fully functioning accounting department post disaster.
 - a. Contact Town Bank to order check stock and set up I-Stream deposit capture system.
 - b. Establish connection to SAGE data file and accounting drive from server back up
 - c. Establish connection to Paychex on-line payroll reporting system
6. Lovell Site re-opening
 - a. Information Solutions Director
 - i. Restore back up to Lovell server
 - ii. Coordinate hardware set up and testing
 - b. COO
 - i. Re-establish Lovell Street telecommunications and internet services, key contact – Patsy Reichert, Technology Management Solutions, 414.975.3529.
 - ii. Coordinate set up of telecommunications equipment, key contact – Chis Haig, Comnet, 262.783.5400
 - iii. Re-establish Lovell equipment i.e. copiers, postage machines, etc. for satellite sites, key contact – Nic Pal, James Imaging, 262.781.7700
 - iv. Finalize restoration of Lovell.
 - v. Coordinate set up of offices and cubicles with furniture and equipment.
 - c. CEO
 - i. Inform Division Directors of staging for program services back at Lovell site.
 - ii. Coordinate staffing at sites to ensure minimal disruption in services to clients.
 - iii. Inform media and contract contact persons of restoration of services at Lovell site.
 - iv. Inform 211 of restoration of services at Lovell site.

Throughout the Business Restoration Plan process members of the Emergency Management Team will meet on a daily basis or as needed to ensure business restoration plan is on track and to deal with unforeseen circumstances.

Satellite Site Supply List

The follow is a list of resources and supplies required to conduct business operations at the satellite sites.

Laptop/desktop computers
Desks
Office chairs
Lobby furniture
Telephones
Multi-function copy machines
Postage machine
General office supplies

IRS FORM 990

ITEM # 25

Milwaukee County has a current copy of Community Advocates' Form 990 on file.

CERTIFIED AUDIT/BOARD APPROVED FINANCIAL STATEMENT *ITEM # 28*

Milwaukee County has a current copy of Community Advocates' certified audit on file.

FORM 5 TOTAL AGENCY ANTICIPATED EXPENSES

If you have a Federally approved indirect rate enter it here as %

AGENCY N Community Advocates, Inc.

Control Acct. No.	(A) Expenditure Description	(B) 2013 Actual	(C) 2014 Gross Budget	(D) 2015 Gross Budget	(E1) ZONE 1 (program) Gross Budget	(E2) ZONE 2 (program) Gross Budget	(E3) ZONE 3 (program) Gross Budget	(E4) ZONE 4 (program) Gross Budget	(E5) ZONE 5 (program) Gross Budget	(E6) ZONE 6 (program) Gross Budget	(F) Indirect Costs Gross Budget*	(G) Other Contracts Programs & Functions**
7000	Salaries	5,394,709	4,325,272	4,329,566	317,853	264,599	151,089	268,489	128,639	146,089	345,742	2,768,885
7100	Employee Health & Retirement Benefits	475,064	398,452	497,872	39,743	79,709	18,889	29,599	16,082	17,131	32,519	244,100
7200	Payroll Taxes	699,399	624,668	583,009	35,634	32,190	18,357	32,846	16,690	17,750	43,043	355,689
8000	Professional Fees	540,975	574,906	464,468							105,593	358,875
8100	Supplies	283,763	138,102	118,819	12,394	7,990	4,277	7,990	3,447	3,447	2,371	71,083
8200	Telephone	117,033	87,848	85,325	9,634	6,720	1,637	3,424	1,022	1,022	13,811	48,145
8300	Postage and Shipping	32,715	35,000	20,000	4,920	3,424	1,187	3,424	1,022	1,022	5,000	1
8400	Occupancy	945,282	1,095,645	1,013,368	41,295	22,398	8,428	31,811	8,862	9,146	120,178	770,020
8500	Rental, Maintenance & Depreciation of Equipment	523,287	290,492	213,958	9,240	5,849	2,374	6,849	2,044	2,044	24,011	166,939
8600	Printing and Publications	40,131	28,000	19,000	4,022	2,806	973	2,806	888	888	2,256	4,181
8700	Travel	112,871	110,324	85,461	11,640	1,141	296	1,141	340	340	2,500	71,563
8800	Conferences, Conventions, Meetings	76,216	109,926	41,291	656	456	150	457	136	136	6,000	33,292
8900	Specific Assistance to Individuals	1,519,820	1,209,208	1,188,091								1,188,091
9000	Membership Dues	22,102	19,009	18,593		380	190	571	170	170	10,659	3,835
9100	Awards and Grants											
9200	Allocations (From indirect Cost Allocation Plans if applicable)											
9300	Client Transportation											
9400	Miscellaneous	106,884	102,718	66,500								63,500
9500	Depreciation or Amortization											
9600	Allocations to Agencies, Payments to affiliated Organizations	3,227,560	3,099,048	2,715,500								2,715,500
	TOTAL EXPENSES	14,536,431	12,200,720	11,408,113	56,432	47,032	26,811	47,898	22,836	23,064	(717,753)	9,349,010
	PROFIT FACTOR											
	TOTAL EXPENSES INCLUDING PROFIT	14,526,421	12,200,720	11,408,113								9,349,010
	TOTAL NON-DUES CONTRACT REV BROUGHT FWD			9,349,010								9,349,010
	TOTAL DUES REQUEST	14,526,421	12,200,720	2,059,103	56,432	47,032	26,811	47,898	201,068	201,068		9,349,010

Rev. 6/14

Date (Initial):
Date (Final): April 24, 2015

* Control Account Number 9200, Allocated Costs, column F, should be entered as a negative number in order for column D to cross-foot to zero.

** Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
4906 W. Fond du Lac Ave Milwaukee, WI 53216
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME (SELECT FROM TABLE OF CONTENTS) ZONE 1
 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *
 TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications Other: (Specify)

ALL Proposers must provide the UNITS details even if their Programs are Cost reimbursements only

COST CALCULATIONS:	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="30,800.00"/>	<input type="text" value="\$ 733,414"/>	<input type="text" value="\$ 23.81"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="30,800.00"/>	<input type="text" value="\$ 733,414"/>	<input type="text" value="\$ 23.81"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target (**Management Services Division**
 Program Name **ZONE 1**
 Facility Name **Community Advocates, Inc.**
 Address **4906 W. Fond du Lac Ave Milwaukee, WI 53216**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	452,143
7100	Employee Health & Retirement Benefits	-	58,084
7200	Payroll Taxes	-	54,935
8000	Professional Fees	-	-
8100	Supplies	-	12,294
8200	Telephone	-	9,634
8300	Postage and Shipping	-	4,920
8400	Occupancy	-	45,708
8500	Rental, Maintenance & Depreciation of Equipment	-	9,840
8600	Printing and Publications	-	4,032
8700	Travel	-	1,640
8800	Conferences, Conventions, Meetings	-	656
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	820
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	78,707
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
	TOTAL EXPENSES	\$ -	\$ 733,414
0.00%	PROFIT FACTOR	-	-
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 733,414
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD	-	-
	TOTAL DHHS REQUEST	\$ -	\$ 733,414

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program **ZONE 1** 2015 Prgm No. **MSD 001**
 Facility Name **Community Advocates, Inc.**
 Address **4906 W. Fond du Lac Ave Milwaukee, WI 53216**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	452,143
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 452,143
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$3,436.29
	7103	Medical & Hospital Plan Premiums	\$0.00	\$53,443.31
	7104	Pension or Retirement Plan Premiums	\$0.00	\$1,204.51
	7105	Supp. Payments to Pensioned Employes	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 58,084
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$34,588.95
	7202	Unemployment Insurance	\$0.00	\$14,694.65
	7203	Workmen's Compensation Insurance	\$0.00	\$5,651.79
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 54,935
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

*Must be the same dollar amount as shown on Form 3

**Attach a copy of the memorandum of agreement between the agency and the professional when using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2012 Gross Budget	(C) 2013 Gross Budget	
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00	
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00	
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00	
	8104	Food & Beverages	\$0.00	\$0.00	
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00	
	8106	Office Supplies-Stationery, Typing	\$0.00	\$12,294.00	
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00	
	8108	New Goods Purchased	\$0.00	\$0.00	
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	
	8110	Manufacturing Supplies	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$ -	\$ 12,294	
8200	8201	Telephone Expense	\$0.00	\$9,634.00	
	8202	Telegraph Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$ -	\$ 9,634	
8300	8301	Postage and Parcel Post	\$0.00	\$4,920.00	
	8302	Freight	\$0.00	\$0.00	
	8303	Messenger & Delivery Service	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 4,920	
8400	8401	Office Rent	\$0.00	\$0.00	
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$3,873.00	
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$592.00	
	8404	Mortgage Interest	\$0.00	\$9,036.00	
	8405	Electricity	\$0.00	\$7,903.00	
	8406	Gas	\$0.00	\$0.00	
	8407	Heating Oil	\$0.00	\$0.00	
	8408	Water & Sewer	\$0.00	\$0.00	
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$4,287.00	
	8410	Real Estate Taxes	\$0.00	\$2,779.00	
	8411	Personal Property Taxes	\$0.00	\$0.00	
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$1,244.00	
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	
	8416	Depreciation - Buildings	\$0.00	\$15,994.00	
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$ -	\$ 45,708	
8500	8501	Equipment rental expenses	\$0.00	\$9,840.00	
	8502	Equipment Maintenance expenses	\$0.00	\$0.00	
	8503	Equipment - Depreciation	\$0.00	\$0.00	
	8504	Equipment - Interest Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 9,840	

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.** 2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
8600	8601	Printing	\$0.00	\$4,032.00
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8600 SUB TOTAL* \$ - \$ 4,032

8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$1,640.00
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8700 SUB TOTAL* \$ - \$ 1,640

8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$656.00

CONTROL ACCOUNT NO. 8800 SUB TOTAL* \$ - \$ 656

8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocaton, etc.	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8900 SUB TOTAL* \$ - \$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.		2015 Prgm No. MSD 001
Control Acct. No.	(A) Sub-Account Number	(B) 2014 Gross Budget
	Account Description	(C) 2015 Gross Budget
9000	9001	Individual Dues \$0.00
	9002	Organizational Dues \$0.00

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ - \$ 820

9100	9101	Grants to Research Institutions	\$0.00	\$0.00
	9102	Graduate Fellowships	\$0.00	\$0.00
	9103	Trainee Scholarships	\$0.00	\$0.00
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00
	9107	Lump Sum Camperships	\$0.00	\$0.00
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9100 SUB TOTAL * \$ - \$ -

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	78,707
	9202	Transportation		-

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ - \$ 78,707

9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	9303	Repairs - Company Vehicles	\$0.00	\$0.00
	9304	Insurance - Company Vehicles	\$0.00	\$0.00
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	9307	Tires - Company Vehicles	\$0.00	\$0.00
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9300 SUB TOTAL* \$ - \$ -

9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00
	9402	Employee Bonding Insurance	\$0.00	\$0.00
	9403	Other	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9400 SUB TOTAL * \$ - \$ -

9500	9501-9504	Depreciation or Amortization	\$0.00	\$0.00
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See Accounts Related to the Statement of Expenses in the GUIDELINES.

9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9600 SUB TOTAL* \$ - \$ -

GRAND TOTAL*** \$ - \$ 733,414

Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

Rev. 6/14

Date (Initial): **March 26, 2015**
Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Group **Management Services Division**
 Program **ZONE 1**
 Agency Name **Community Advocates, Inc.**
 Address **4906 W. Fond du Lac Ave Milwaukee, WI 53216**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A)	(B)	(C)
	Revenue	2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5200	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
TOTAL NON-DHHS REVENUE		\$ -	\$ -
DHHS CONTRACT REQUEST		-	733,414
TOTAL REVENUE		\$ -	\$ 733,414

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

Item # 28 Form 4E1

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FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.
 Priority/Target Group Management Services Division
 Program ZONE 1
 Facility Name Community Advocates, Inc.
 Address 4906 W. Fond du Lac Ave Milwaukee, WI 53216

2015 Prgm No. MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

Agency Name Community Advocates, Inc.

2015 Prgm No. MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/.437 - Milwaukee County	-	-
	5108	51.42/.437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
	5125	Other	-	-
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
	CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.** 2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A)	(B)	(C)
		Account Description	2014 Revenue Budget	2015 Revenue Budget
6200	6201	Income from Private Pay Clients	-	-
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-
	6204	Income from 51,42,437 Clients (Direct Pay Portion Only)	-	-
	6205	Income from Client Pick-up and Delivery Charges	-	-
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-
	6207	Other Third Party Non-Governmental Income	-	-
CONTROL ACCOUNT NO. 6200 SUB TOTAL*			-	-
6300		Intra-Agency Sales of Supplies & Service	-	-
CONTROL ACCOUNT NO. 6300 SUB TOTAL *			-	-
6400	6401	Sale of Production	-	-
	6402	Sale of Property & Other Assets	-	-
	6403	Sale of Staff Services	-	-
CONTROL ACCOUNT NO. 6400 SUB TOTAL*			-	-
6500	6501	Interest	-	-
	6502	Dividends	-	-
	6503	Other	-	-
CONTROL ACCOUNT NO. 6500 SUB TOTAL*			-	-
6600		Gains (Losses) on Investment Trans.	-	-
CONTROL ACCOUNT NO. 6600 SUB TOTAL *			-	-
6900		Miscellaneous Revenue	-	-
CONTROL ACCOUNT NO. 6900 SUB TOTAL*			-	-
GRAND TOTAL**			-	-

*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Rev. 6/14

Date (Initial): **March 26, 2015**
Date (Final):

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Advocates, Inc.**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 1	1	A	0
ZONE 1	1	B	0
ZONE 1	1	H	0
ZONE 1	1	I	0
ZONE 1	1	W	0
ZONE 1	2	A	0
ZONE 1	2	B	8.3935
ZONE 1	2	H	0
ZONE 1	2	I	0
ZONE 1	2	W	0
ZONE 1	3	A	0
ZONE 1	3	B	0
ZONE 1	3	H	0
ZONE 1	3	I	0
ZONE 1	3	W	0
ZONE 1	4	A	0
ZONE 1	4	B	0
ZONE 1	4	H	0
ZONE 1	4	I	0
ZONE 1	4	W	0
ZONE 1	5	A	0
ZONE 1	5	B	0
ZONE 1	5	H	0
ZONE 1	5	I	0
ZONE 1	5	W	0
ZONE 1	6	A	0
ZONE 1	6	B	0
ZONE 1	6	H	0
ZONE 1	6	I	0
ZONE 1	6	W	0
ZONE 1	7	A	0
ZONE 1	7	B	0
ZONE 1	7	H	0
ZONE 1	7	I	0
ZONE 1	7	W	0
ZONE 1	8	A	0
ZONE 1	8	B	0
ZONE 1	8	H	0
ZONE 1	8	I	0
ZONE 1	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify: _____ Hrs/Week

% of Handicapped employees

Ethnicity % to total FTE
Rev. 6/14

A	B	H	I	W
0.00%	100.00%	0.00%	0.00%	0.00%

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Programs funded by Site must include separate form for each Site.

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME ZONE 2
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *

ALL Proposers must provide the UNITS details even if their Programs are Cost reimbursement only

TYPE OF UNIT: Moath / Day/ Hour/1/4 Hour/other Applications.
 Other: (Specify)

COST CALCULATIONS:	TOTAL PROGRAM UNITS	PROGRAM COST BY FUNDING SOURCE	COST PER UNIT
	(A)	(B)	(C)
1. DHHS Program's Units and Costs	<input type="text" value="22,000.00"/>	<input type="text" value="\$ 511,168"/>	<input type="text" value="\$ 23.23"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="22,000.00"/>	<input type="text" value="\$ 511,168"/>	<input type="text" value="\$ 23.23"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: Community Advocates, Inc.

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 2	1	A	0
ZONE 2	1	B	0
ZONE 2	1	H	0
ZONE 2	1	I	0
ZONE 2	1	W	0
ZONE 2	2	A	0
ZONE 2	2	B	3.3935
ZONE 2	2	H	3
ZONE 2	2	I	0
ZONE 2	2	W	0
ZONE 2	3	A	0
ZONE 2	3	B	0
ZONE 2	3	H	0
ZONE 2	3	I	0
ZONE 2	3	W	0
ZONE 2	4	A	0
ZONE 2	4	B	0
ZONE 2	4	H	0
ZONE 2	4	I	0
ZONE 2	4	W	0
ZONE 2	5	A	0
ZONE 2	5	B	0
ZONE 2	5	H	0
ZONE 2	5	I	0
ZONE 2	5	W	0
ZONE 2	6	A	0
ZONE 2	6	B	0
ZONE 2	6	H	0
ZONE 2	6	I	0
ZONE 2	6	W	0
ZONE 2	7	A	0
ZONE 2	7	B	0
ZONE 2	7	H	0
ZONE 2	7	I	0
ZONE 2	7	W	0
ZONE 2	8	A	0
ZONE 2	8	B	0
ZONE 2	8	H	0
ZONE 2	8	I	0
ZONE 2	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify: _____ Hrs/Week

% of Handicaped employees	0.00%
---------------------------	-------

Ethnicity % to total FTE
Rev. 6/14

A	B	H	I	W
0.00%	53.08%	46.92%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program Name **ZONE 2**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	316,139
7100	Employee Health & Retirement Benefits	-	39,816
7200	Payroll Taxes	-	38,411
8000	Professional Fees	-	-
8100	Supplies	-	7,990
8200	Telephone	-	6,720
8300	Postage and Shipping	-	3,424
8400	Occupancy	-	31,813
8500	Rental, Maintenance & Depreciation of Equipment	-	6,849
8600	Printing and Publications	-	2,806
8700	Travel	-	1,141
8800	Conferences, Conventions, Meetings	-	456
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	570
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	55,032
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
	TOTAL EXPENSES	\$ -	\$ 511,168
0.00%	PROFIT FACTOR	-	-
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 511,168
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD	-	-
	TOTAL DHHS REQUEST	\$ -	\$ 511,168

Rev. 6/14

Date (Initial): **March 26, 2015**

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 am **ZONE 2** 2015 Prgm No. **MSD 001**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	316,139
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 316,139
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$2,402.66
	7103	Medical & Hospital Plan Premiums	\$0.00	\$36,571.64
	7104	Pension or Retirement Plan Premiums	\$0.00	\$842.19
	7105	Supp. Payments to Pensioned Employees	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 39,816
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$24,184.64
	7202	Unemployment Insurance	\$0.00	\$10,274.52
	7203	Workmen's Compensation Insurance	\$0.00	\$3,951.74
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 38,411
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

*Must be the same dollar amount as shown on Form 3
 **Attach a copy of the memorandum of agreement between the agency and the professional when using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014		(C) 2015
			Gross Budget		Gross Budget
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00	\$0.00
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00	\$0.00
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00	\$0.00
	8104	Food & Beverages	\$0.00	\$0.00	\$0.00
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00	\$0.00
	8106	Office Supplies-Stationery, Typing	\$0.00	\$7,990.00	\$0.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00	\$0.00
	8108	New Goods Purchased	\$0.00	\$0.00	\$0.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8100 SUB TOTAL *			\$ -	\$ 7,990	
8200	8201	Telephone Expense	\$0.00	\$6,720.00	\$0.00
	8202	Telegraph Expense	\$0.00	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL *			\$ -	\$ 6,720	
8300	8301	Postage and Parcel Post	\$0.00	\$3,424.00	\$0.00
	8302	Freight	\$0.00	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 3,424	
8400	8401	Office Rent	\$0.00	\$0.00	\$0.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$2,696.00	\$0.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$413.00	\$0.00
	8404	Mortgage Interest	\$0.00	\$6,289.00	\$0.00
	8405	Electricity	\$0.00	\$5,501.00	\$0.00
	8406	Gas	\$0.00	\$0.00	\$0.00
	8407	Heating Oil	\$0.00	\$0.00	\$0.00
	8408	Water & Sewer	\$0.00	\$0.00	\$0.00
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$2,984.00	\$0.00
	8410	Real Estate Taxes	\$0.00	\$1,934.00	\$0.00
	8411	Personal Property Taxes	\$0.00	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$865.00	\$0.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$11,131.00	\$0.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL *			\$ -	\$ 31,813	
8500	8501	Equipment rental expenses	\$0.00	\$6,849.00	\$0.00
	8502	Equipment Maintenance expenses	\$0.00	\$0.00	\$0.00
	8503	Equipment - Depreciation	\$0.00	\$0.00	\$0.00
	8504	Equipment - Interest Expense	\$0.00	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 6,849	

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.		MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8600	8601	Printing	\$0.00	\$2,806.00
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8600 SUB TOTAL* \$ - \$ 2,806

8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$1,141.00
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8700 SUB TOTAL* \$ - \$ 1,141

8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$456.00

CONTROL ACCOUNT NO. 8800 SUB TOTAL* \$ - \$ 456

8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8900 SUB TOTAL* \$ - \$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.		MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$570.00

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ - \$ 570

9100	9101	Grants to Research Institutions	\$0.00	\$0.00
	9102	Graduate Fellowships	\$0.00	\$0.00
	9103	Trainee Scholarships	\$0.00	\$0.00
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00
	9107	Lump Sum Camperships	\$0.00	\$8.00
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9100 SUB TOTAL * \$ - \$ -

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	\$5,032
	9202	Transportation	-	-

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ - \$ 55,032

9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	9303	Repairs - Company Vehicles	\$0.00	\$0.00
	9304	Insurance - Company Vehicles	\$0.00	\$0.00
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	9307	Tires - Company Vehicles	\$0.00	\$0.00
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9300 SUB TOTAL* \$ - \$ -

9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00
	9402	Employee Bonding Insurance	\$0.00	\$0.00
	9403	Other	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9400 SUB TOTAL * \$ - \$ -

9500	9501-9504	Depreciation or Amortization	\$ -	\$ -
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See Accounts Related to the Statement of Expenses in the GUIDELINES.

9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9600 SUB TOTAL* \$ - \$ -

GRAND TOTAL*** \$ - \$ 511,168

Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

Rev. 6/14

Date (Initial): March 26, 2015
Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Group **Management Services Divison**
 am **ZONE 2**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

	(A)	(B)	(C)
Control Acct. No.	Revenue	2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5200	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
	TOTAL NON-DHES REVENUE	\$ -	\$ -
	DHHS CONTRACT REQUEST	-	511,168
	TOTAL REVENUE	\$ -	\$ 511,168

Rev. 6/14

Date (Initial): **March 26, 2015**

Date (Final):

Item # 28 Form 4E2

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FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Facility/Target **Management Services Divison**
 Program **ZONE 2**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.

2015 Prgm No.

MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/.437 - Milwaukee County	-	-
	5108	51.42/.437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
	5125	Other	-	-
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-	-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**

2015 Prgm No.

MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
6200	6201	Income from Private Pay Clients	-	-
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-
	6204	Income from 51.42/437 Clients (Direct Pay Portion Only)	-	-
	6205	Income from Client Pick-up and Delivery Charges	-	-
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-
	6207	Other Third Party Non-Governmental Income	-	-

CONTROL ACCOUNT NO. 6200 SUB TOTAL*

- -

6300		Intra-Agency Sales of Supplies&Service	-	-
------	--	--	---	---

CONTROL ACCOUNT NO. 6300 SUB TOTAL *

- -

6400	6401	Sale of Production	-	-
	6402	Sale of Property & Other Assets	-	-
	6403	Sale of Staff Services	-	-

CONTROL ACCOUNT NO. 6400 SUB TOTAL*

- -

6500	6501	Interest	-	-
	6502	Dividends	-	-
	6503	Other	-	-

CONTROL ACCOUNT NO. 6500 SUB TOTAL*

- -

6600		Gains (Losses) on Investment Trans.	-	-
------	--	-------------------------------------	---	---

CONTROL ACCOUNT NO. 6600 SUB TOTAL *

- -

6900		Miscellaneous Revenue	-	-
------	--	-----------------------	---	---

CONTROL ACCOUNT NO. 6900 SUB TOTAL*

- -

GRAND TOTAL**

- -

*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Rev. 6/14

Date (Initial): March 26, 2015
Date (Final): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison
 PROGRAM NAME ZONE 3
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *

ALL Proposers must provide the UNITS details even if their Programs are Cost reimburbments only

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other
 Other: (Specify)

<u>COST CALCULATIONS:</u>	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="7,040.00"/>	<input type="text" value="\$ 155,573"/>	<input type="text" value="\$ 22.10"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="7,040.00"/>	<input type="text" value="\$ 155,573"/>	<input type="text" value="\$ 22.10"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL): _____ March 26, 2015 DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: Community Advocates, Inc.

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 3	1	A	0
ZONE 3	1	B	0
ZONE 3	1	H	0
ZONE 3	1	I	0
ZONE 3	1	W	0
ZONE 3	2	A	0
ZONE 3	2	B	0.3935
ZONE 3	2	H	0
ZONE 3	2	I	0
ZONE 3	2	W	0
ZONE 3	3	A	0
ZONE 3	3	B	0
ZONE 3	3	H	0
ZONE 3	3	I	0
ZONE 3	3	W	0
ZONE 3	4	A	0
ZONE 3	4	B	0
ZONE 3	4	H	0
ZONE 3	4	I	0
ZONE 3	4	W	0
ZONE 3	5	A	0
ZONE 3	5	B	0
ZONE 3	5	H	0
ZONE 3	5	I	0
ZONE 3	5	W	0
ZONE 3	6	A	0
ZONE 3	6	B	0
ZONE 3	6	H	0
ZONE 3	6	I	0
ZONE 3	6	W	0
ZONE 3	7	A	0
ZONE 3	7	B	0
ZONE 3	7	H	0
ZONE 3	7	I	0
ZONE 3	7	W	0
ZONE 3	8	A	0
ZONE 3	8	B	0
ZONE 3	8	H	0
ZONE 3	8	I	0
ZONE 3	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify:

Hrs/Week

% of Handicaped employees	0.00%
---------------------------	-------

Ethnicity % to total FTE
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A	B	H	I	W
0.00%	#####	0.00%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program Name **ZONE 3**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	93,639
7100	Employee Health & Retirement Benefits	-	12,029
7200	Payroll Taxes	-	11,377
8000	Professional Fees	-	-
8100	Supplies	-	4,277
8200	Telephone	-	1,637
8300	Postage and Shipping	-	1,187
8400	Occupancy	-	11,028
8500	Rental, Maintenance & Depreciation of Equipment	-	2,374
8600	Printing and Publications	-	973
8700	Travel	-	396
8800	Conferences, Conventions, Meetings	-	158
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	198
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	16,300
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
	TOTAL EXPENSES	\$ -	\$ 155,573
0.00%	PROFIT FACTOR	-	-
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 155,573
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD	-	-
	TOTAL DHHS REQUEST	\$ -	\$ 155,573

Rev. 6/14

Date (Initial): **March 26, 2015**

Date (Final):

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FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Division**
 ram **ZONE 3** 2015 Prgm No. **MSD 001**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	93,639
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 93,639
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$711.66
	7103	Medical & Hospital Plan Premiums	\$0.00	\$11,068.14
	7104	Pension or Retirement Plan Premiums	\$0.00	\$249.45
	7105	Supp. Payments to Pensioned Employes	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 12,029
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$7,163.39
	7202	Unemployment Insurance	\$0.00	\$3,043.27
	7203	Workmen's Compensation Insurance	\$0.00	\$1,170.49
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 11,377
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

*Must be the same dollar amount as shown on Form 3

**Attach a copy of the memorandum of agreement between the agency and the professional using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 38 ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A)	(B)	(C)	
		Account Description	2014 Gross Budget	2015 Gross Budget	
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00	
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00	
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00	
	8104	Food & Beverages	\$0.00	\$0.00	
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00	
	8106	Office Supplies-Stationery, Typing	\$0.00	\$4,277.00	
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00	
	8108	New Goods Purchased	\$0.00	\$0.00	
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	
	8110	Manufacturing Supplies	\$0.00	\$0.00	
	CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$ -	\$ 4,277
8200	8201	Telephone Expense	\$0.00	\$1,637.00	
	8202	Telegraph Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$ -	\$ 1,637	
8300	8301	Postage and Parcel Post	\$0.00	\$1,187.00	
	8302	Freight	\$0.00	\$0.00	
	8303	Messenger & Delivery Service	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 1,187	
8400	8401	Office Rent	\$0.00	\$0.00	
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$934.57	
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$143.02	
	8404	Mortgage Interest	\$0.00	\$2,190.05	
	8405	Electricity	\$0.00	\$1,906.64	
	8406	Gas	\$0.00	\$0.00	
	8407	Heating Oil	\$0.00	\$0.00	
	8408	Water & Sewer	\$0.00	\$0.00	
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$1,034.46	
	8410	Real Estate Taxes	\$0.00	\$670.55	
	8411	Personal Property Taxes	\$0.00	\$0.00	
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$300.15	
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	
	8416	Depreciation - Buildings	\$0.00	\$3,858.53	
	CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$ -	\$ 11,028
8500	8501	Equipment rental expenses	\$0.00	\$2,373.95	
	8502	Equipment Maintenance expenses	\$0.00	\$0.00	
	8503	Equipment - Depreciation	\$0.00	\$0.00	
	8504	Equipment - Interest Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 2,374	

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FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.		MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
Community Advocates, Inc.				
8600	8601	Printing	\$0.00	\$972.76
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8600 SUB TOTAL*			\$ -	\$ 973
8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$395.66
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8700 SUB TOTAL*			\$ -	\$ 396
8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$158.26
CONTROL ACCOUNT NO. 8800 SUB TOTAL*			\$ -	\$ 158
8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8900 SUB TOTAL*			\$ -	\$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.	2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$197.83

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ - \$ 198

9100	9101	Grants to Research Institutions	\$0.00	\$0.00
	9102	Graduate Fellowships	\$0.00	\$0.00
	9103	Trainee Scholarships	\$0.00	\$0.00
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00
	9107	Lump Sum Camperships	\$0.00	\$0.00
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9100 SUB TOTAL * \$ - \$ -

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	16,300
	9202	Transportation		

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ - \$ 16,300

9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	9303	Repairs - Company Vehicles	\$0.00	\$0.00
	9304	Insurance - Company Vehicles	\$0.00	\$0.00
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	9307	Tires - Company Vehicles	\$0.00	\$0.00
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9300 SUB TOTAL* \$ - \$ -

9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00
	9402	Employee Bonding Insurance	\$0.00	\$0.00
	9403	Other	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9400 SUB TOTAL * \$ - \$ -

9500	9501-9504	Depreciation or Amortization	\$ -	\$ -
See Accounts Related to the Statement of Expenses in the GUIDELINES.				

9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9600 SUB TOTAL* \$ - \$ -

Grand Tptal *** \$ - \$ 155,573

***Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

Rev. 6/14

Date (Initial): March 26, 2015

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Group **Management Services Division**
 Program **ZONE 3**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Revenue	(B)	(C)
		2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
()	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
TOTAL NON-DHHS REVENUE		\$ -	\$ -
DHHS CONTRACT REQUEST		-	155,573
TOTAL REVENUE		\$ -	\$ 155,573

Rev. 6/14

Date (Initial): **March 26, 2015**

Date (Final):

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Agency Name **Community Advocates, Inc.**
 Municipality/Target Group **Management Services Division**
 Program **ZONE 3**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

Agency Name

Community Advocates, Inc.

2015 Prgm No.

MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/437 - Milwaukee County	-	-
	5108	51.42/437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
	5125	Other	-	-
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-	-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

Agency Name		Community Advocates, Inc.			2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)		
			2014 Revenue Budget	2015 Revenue Budget		
6200	6201	Income from Private Pay Clients	-	-		
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-		
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-		
	6204	Income from 51.42/437 Clients (Direct Pay Portion Only)	-	-		
	6205	Income from Client Pick-up and Delivery Charges	-	-		
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-		
	6207	Other Third Party Non-Governmental Income	-	-		
CONTROL ACCOUNT NO. 6200 SUB TOTAL*			-	-		
6300		Intra-Agency Sales of Supplies & Service	-	-		
CONTROL ACCOUNT NO. 6300 SUB TOTAL *			-	-		
6400	6401	Sale of Production	-	-		
	6402	Sale of Property & Other Assets	-	-		
	6403	Sale of Staff Services	-	-		
CONTROL ACCOUNT NO. 6400 SUB TOTAL*			-	-		
6500	6501	Interest	-	-		
	6502	Dividends	-	-		
	6503	Other	-	-		
CONTROL ACCOUNT NO. 6500 SUB TOTAL*			-	-		
6600		Gains (Losses) on Investment Trans.	-	-		
CONTROL ACCOUNT NO. 6600 SUB TOTAL *			-	-		
6900		Miscellaneous Revenue	-	-		
CONTROL ACCOUNT NO. 6900 SUB TOTAL*			-	-		
GRAND TOTAL**			-	-		

*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Rev. 6/14

Date (Initial): March 26, 2015
Date (Final): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME ZONE 4
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK 5.00
 NUMBER HOURS PROGRAM OPERATES PER DAY 8.00
 NUMBER OF CASES TO BE SERVED PER YEAR * 24,640.00

ALL Proposers must provide the UNITS details even if their Programs are Cost reimburmments only

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Other Applications
 Other: (Specify)

<u>COST CALCULATIONS:</u>	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	24,640.00	\$ 533,392	\$ 21.65
2. Other Funding Source's Units and Costs	0.00	\$ -	\$ -
3. Total	24,640.00	\$ 533,392	\$ 21.65
4. 2014 Budgeted Units and Costs	0.00	\$ -	\$ -
5. 2013 Actual Units and Costs	0.00	\$ -	\$ -

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Advocates, Inc.**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 4	1	A	0
ZONE 4	1	B	0
ZONE 4	1	H	0
ZONE 4	1	I	0
ZONE 4	1	W	0
ZONE 4	2	A	0
ZONE 4	2	B	0.3935
ZONE 4	2	H	0
ZONE 4	2	I	0
ZONE 4	2	W	0
ZONE 4	3	A	0
ZONE 4	3	B	0
ZONE 4	3	H	0
ZONE 4	3	I	0
ZONE 4	3	W	0
ZONE 4	4	A	0
ZONE 4	4	B	0
ZONE 4	4	H	0
ZONE 4	4	I	0
ZONE 4	4	W	0
ZONE 4	5	A	0
ZONE 4	5	B	0
ZONE 4	5	H	0
ZONE 4	5	I	0
ZONE 4	5	W	0
ZONE 4	6	A	0
ZONE 4	6	B	0
ZONE 4	6	H	0
ZONE 4	6	I	0
ZONE 4	6	W	0
ZONE 4	7	A	0
ZONE 4	7	B	0
ZONE 4	7	H	0
ZONE 4	7	I	0
ZONE 4	7	W	0
ZONE 4	8	A	0
ZONE 4	8	B	0
ZONE 4	8	H	0
ZONE 4	8	I	0
ZONE 4	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify: _____ Hrs/Week

% of Handicaped employees 0.00%

Ethnicity % to total FTE
Rev 6/14

A	B	H	I	W
0.00%	#####	0.00%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program Name **ZONE 4**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	334,139
7100	Employee Health & Retirement Benefits	-	42,017
7200	Payroll Taxes	-	40,598
8000	Professional Fees	-	-
8100	Supplies	-	7,990
8200	Telephone	-	3,424
8300	Postage and Shipping	-	3,424
8400	Occupancy	-	31,811
8500	Rental, Maintenance & Depreciation of Equipment	-	6,849
8600	Printing and Publications	-	2,806
8700	Travel	-	1,141
8800	Conferences, Conventions, Meetings	-	457
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	571
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	58,165
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
TOTAL EXPENSES		\$ -	\$ 533,392
PROFIT FACTOR		-	-
TOTAL EXPENSES INCLUDING PROFIT		\$ -	\$ 533,392
TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		-	-
TOTAL DHHS REQUEST		\$ -	\$ 533,392

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Division**
 Program **ZONE 4**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	334,139
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 334,139
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$2,539.46
	7103	Medical & Hospital Plan Premiums	\$0.00	\$38,587.24
	7104	Pension or Retirement Plan Premiums	\$0.00	\$890.15
	7105	Supp. Payments to Pensioned Employees	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 42,017
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$25,561.64
	7202	Unemployment Insurance	\$0.00	\$10,859.52
	7203	Workmen's Compensation Insurance	\$0.00	\$4,176.74
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 40,598
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

*Must be the same dollar amount as shown on Form 3

**Attach a copy of the memorandum of agreement between the agency and the professional using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.		MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00
	8104	Food & Beverages	\$0.00	\$0.00
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00
	8106	Office Supplies-Stationery, Typing	\$0.00	\$7,990.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00
	8108	New Goods Purchased	\$0.00	\$0.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$ -	\$ 7,990
8200	8201	Telephone Expense	\$0.00	\$3,424.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$ -	\$ 3,424
8300	8301	Postage and Parcel Post	\$0.00	\$3,424.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 3,424
8400	8401	Office Rent	\$0.00	\$0.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$2,695.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$412.00
	8404	Mortgage Interest	\$0.00	\$6,289.00
	8405	Electricity	\$0.00	\$5,500.00
	8406	Gas	\$0.00	\$0.00
	8407	Heating Oil	\$0.00	\$0.00
	8408	Water & Sewer	\$0.00	\$0.00
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$2,984.00
	8410	Real Estate Taxes	\$0.00	\$1,934.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$866.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$11,131.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$ -	\$ 31,811
8500	8501	Equipment rental expenses	\$0.00	\$6,849.00
	8502	Equipment Maintenance expenses	\$0.00	\$0.00
	8503	Equipment - Depreciation	\$0.00	\$0.00
	8504	Equipment - Interest Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 6,849

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.		MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8600	8601	Printing	\$0.00	\$2,806.00
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8600 SUB TOTAL*			\$ -	\$ 2,806
8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$1,141.00
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8700 SUB TOTAL*			\$ -	\$ 1,141
8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$457.00
CONTROL ACCOUNT NO. 8800 SUB TOTAL*			\$ -	\$ 457
8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8900 SUB TOTAL*			\$ -	\$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.	2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$571.00

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ - \$ 571

9100	9101	Grants to Research Institutions	\$0.00	\$0.00
	9102	Graduate Fellowships	\$0.00	\$0.00
	9103	Trainee Scholarships	\$0.00	\$0.00
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00
	9107	Lump Sum Camperships	\$0.00	\$0.00
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9100 SUB TOTAL * \$ - \$ -

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	58,165
	9202	Transportation		

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ - \$ 58,165

9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	9303	Repairs - Company Vehicles	\$0.00	\$0.00
	9304	Insurance - Company Vehicles	\$0.00	\$0.00
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	9307	Tires - Company Vehicles	\$0.00	\$0.00
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9300 SUB TOTAL* \$ - \$ -

9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00
	9402	Employee Bonding Insurance	\$0.00	\$0.00
	9403	Other	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9400 SUB TOTAL * \$ - \$ -

9500	9501-9504	Depreciation or Amortization	\$ -	\$ -
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See Accounts Related to the Statement of Expenses in the GUIDELINES.

9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9600 SUB TOTAL* \$ - \$ -

GRAND TOTAL*** \$ - \$ 533,392

***Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

Rev. 6/14

Date (Initial): March 26, 2015
Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Group **Management Services Division**
 Program **ZONE 4**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgrm No. **MSD 001**

Control Acct. No.	(A)	(B)	(C)
	Revenue	2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5200	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
TOTAL NON-DHHS REVENUE		\$ -	\$ -
DHHS CONTRACT REQUEST		-	533,392
TOTAL REVENUE		\$ -	\$ 533,392

Rev. 6/14

Date (Initial): **March 26, 2015**

Date (Final):

Item # 28 Form 4E4

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Priority/Target **Management Services Divison**
 Program **ZONE 4**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**

2015 Prgm No.

MSD 001

Control Acct. No.	Sub-Account Number	(A)	(B)	(C)
		Account Description	2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/.437 - Milwaukee County	-	-
	5108	51.42/.437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
	5125	Other	-	-
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-	-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.** 2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
6200	6201	Income from Private Pay Clients	-	-
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-
	6204	Income from 51.42/437 Clients (Direct Pay Portion Only)	-	-
	6205	Income from Client Pick-up and Delivery Charges	-	-
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-
	6207	Other Third Party Non-Governmental Income	-	-

CONTROL ACCOUNT NO. 6200 SUB TOTAL* - -

6300		Intra-Agency Sales of Supplies & Service	-	-
------	--	--	---	---

CONTROL ACCOUNT NO. 6300 SUB TOTAL * - -

6400	6401	Sale of Production	-	-
	6402	Sale of Property & Other Assets	-	-
	6403	Sale of Staff Services	-	-

CONTROL ACCOUNT NO. 6400 SUB TOTAL* - -

6500	6501	Interest	-	-
	6502	Dividends	-	-
	6503	Other	-	-

CONTROL ACCOUNT NO. 6500 SUB TOTAL* - -

6600		Gains (Losses) on Investment Trans.	-	-
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CONTROL ACCOUNT NO. 6600 SUB TOTAL * - -

6900		Miscellaneous Revenue	-	-
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CONTROL ACCOUNT NO. 6900 SUB TOTAL* - -

GRAND TOTAL** - -

*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Rev. 6/14

Date (Initial) : March 26, 2015

Date (Final):



FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 ME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Loveil Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME ZONE 5
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK

NUMBER HOURS PROGRAM OPERATES PER DAY

NUMBER OF CASES TO BE SERVED PER YEAR *

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications
 Other: (Specify)

All Proposers must provide the UNIT's details even if their Programs are Cost reimbursements only

<u>COST CALCULATIONS:</u>	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="6,160.00"/>	<input type="text" value="\$ 133,348"/>	<input type="text" value="\$ 21.65"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="6,160.00"/>	<input type="text" value="\$ 133,348"/>	<input type="text" value="\$ 21.65"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Advocates, Inc.**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 5	1	A	0
ZONE 5	1	B	0
ZONE 5	1	H	0
ZONE 5	1	I	0
ZONE 5	1	W	0
ZONE 5	2	A	0
ZONE 5	2	B	0.3935
ZONE 5	2	H	0
ZONE 5	2	I	0
ZONE 5	2	W	0
ZONE 5	3	A	0
ZONE 5	3	B	0
ZONE 5	3	H	0
ZONE 5	3	I	0
ZONE 5	3	W	0
ZONE 5	4	A	0
ZONE 5	4	B	0
ZONE 5	4	H	0
ZONE 5	4	I	0
ZONE 5	4	W	0
ZONE 5	5	A	0
ZONE 5	5	B	0
ZONE 5	5	H	0
ZONE 5	5	I	0
ZONE 5	5	W	0
ZONE 5	6	A	0
ZONE 5	6	B	0
ZONE 5	6	H	0
ZONE 5	6	I	0
ZONE 5	6	W	0
ZONE 5	7	A	0
ZONE 5	7	B	0
ZONE 5	7	H	0
ZONE 5	7	I	0
ZONE 5	7	W	0
ZONE 5	8	A	0
ZONE 5	8	B	0
ZONE 5	8	H	0
ZONE 5	8	I	0
ZONE 5	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify: _____ Hrs/Week

% of Handicaped employees	0.00%
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Ethnicity % to total FTE

Print 6/14

A	B	H	I	W
0.00%	#####	0.00%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program Name **ZONE 5**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	80,639
7100	Employee Health & Retirement Benefits	-	10,359
7200	Payroll Taxes	-	9,798
8000	Professional Fees	-	-
8100	Supplies	-	3,447
8200	Telephone	-	1,022
8300	Postage and Shipping	-	1,022
8400	Occupancy	-	9,496
8500	Rental, Maintenance & Depreciation of Equipment	-	2,044
	Printing and Publications	-	838
8700	Travel	-	340
8800	Conferences, Conventions, Meetings	-	136
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	170
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	14,037
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
	TOTAL EXPENSES	\$ -	\$ 133,348
0.00%	PROFIT FACTOR	-	-
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 133,348
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD	-	-
	TOTAL DHHS REQUEST	\$ -	\$ 133,348

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: **Community Advocates, Inc.**
 Disability/Ta: **Management Services Divison**
 Program: **ZONE 5** 2015 Prgm No. **MSD 001**
 Facility Name: **Community Advocates, Inc.**
 Address: **728 N. James Lovell Milwaukee, WI 53233**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	80,639
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 80,639
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$612.86
	7103	Medical & Hospital Plan Premiums	\$0.00	\$9,531.54
	7104	Pension or Retirement Plan Premiums	\$0.00	\$214.82
	7105	Supp. Payments to Pensioned Employes	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 10,359
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$6,168.89
	7202	Unemployment Insurance	\$0.00	\$2,620.77
	7203	Workmen's Compensation Insurance	\$0.00	\$1,007.99
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 9,798
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

* It be the same dollar amount as shown on Form 3
 ** Attach a copy of the memorandum of agreement between the agency and the professional when using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: Community Advocates, Inc.		2015 Prgm No.	MSD 001	
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00
	8104	Food & Beverages	\$0.00	\$0.00
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00
	8106	Office Supplies-Stationery, Typing	\$0.00	\$3,447.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00
	8108	New Goods Purchased	\$0.00	\$0.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$ -	\$ 3,447
8200	8201	Telephone Expense	\$0.00	\$1,022.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$ -	\$ 1,022
8300	8301	Postage and Parcel Post	\$0.00	\$1,022.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 1,022
8400	8401	Office Rent	\$0.00	\$0.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$805.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$123.00
	8404	Mortgage Interest	\$0.00	\$1,877.00
	8405	Electricity	\$0.00	\$1,641.00
	8406	Gas	\$0.00	\$0.00
	8407	Heating Oil	\$0.00	\$0.00
	8408	Water & Sewer	\$0.00	\$0.00
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$891.00
	8410	Real Estate Taxes	\$0.00	\$578.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$258.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$3,323.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$ -	\$ 9,496
8500	8501	Equipment rental expenses	\$0.00	\$2,044.00
	8502	Equipment Maintenance expenses	\$0.00	\$0.00
	8503	Equipment - Depreciation	\$0.00	\$0.00
	8504	Equipment - Interest Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 2,044

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.			2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8600	8601	Printing	\$0.00	\$838.00
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8600 SUB TOTAL*			\$ -	\$ 838
8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$340.00
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8700 SUB TOTAL*			\$ -	\$ 340
8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particlp.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$136.00
CONTROL ACCOUNT NO. 8800 SUB TOTAL*			\$ -	\$ 136
8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00
	CONTROL ACCOUNT NO. 8900 SUB TOTAL*			\$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget	
9000	9001	Individual Dues	\$0.00	\$0.00	
	9002	Organizational Dues	\$0.00	\$170.00	
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$ -	\$ 170	
9100	9101	Grants to Research Institutions	\$0.00	\$0.00	
	9102	Graduate Fellowships	\$0.00	\$0.00	
	9103	Trainee Scholarships	\$0.00	\$0.00	
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00	
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00	
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00	
	9107	Lump Sum Camperships	\$0.00	\$0.00	
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00	
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00	
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 9100 SUB TOTAL *			\$ -	\$ -	
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	14,037	
	9202	Transportation			
CONTROL ACCOUNT NO. 9200 SUB TOTAL*			\$ -	\$ 14,037	
9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00	
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00	
	9303	Repairs - Company Vehicles	\$0.00	\$0.00	
	9304	Insurance - Company Vehicles	\$0.00	\$0.00	
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00	
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00	
	9307	Tires - Company Vehicles	\$0.00	\$0.00	
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 9300 SUB TOTAL*			\$ -	\$ -	
9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00	
	9402	Employee Bonding Insurance	\$0.00	\$0.00	
	9403	Other	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 9400 SUB TOTAL *			\$ -	\$ -	
9500	9501-9504	Depreciation or Amortization	\$ -	\$ -	
See Accounts Related to the Statement of Expenses in the GUIDELINES.					
9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00	
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 9600 SUB TOTAL*			\$ -	\$ -	
GRAND TOTAL***			\$ -	\$ 133,348	

* Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

Rev. 6/14

Date (Initial): March 26, 2015
Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Group **Management Services Divison**
 Program **ZONE 5**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Revenue	(B)	(C)
		2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
()	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
TOTAL NON-DHHS REVENUE		\$ -	\$ -
DHHS CONTRACT REQUEST		-	133,348
TOTAL REVENUE		\$ -	\$ 133,348

Rev. 6/14

Date (Initial): **March 26, 2015**

Date (Final):

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program **ZONE 5**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Revenue Budget	(C) 2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

* must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**

2015 Prgm No.

MSD 001

Control No.	Sub-Account Number	(A)	(B)	(C)
		Account Description	2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/437 - Milwaukee County	-	-
	5108	51.42/437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
5125	Other	-	-	
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-	-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**

2015 Prgm No.

MSD 001

Control Account No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
6200	6201	Income from Private Pay Clients	-	-
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-
	6204	Income from 51.42/.437 Clients (Direct Pay Portion Only)	-	-
	6205	Income from Client Pick-up and Delivery Charges	-	-
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-
	6207	Other Third Party Non-Governmental Income	-	-

CONTROL ACCOUNT NO. 6200 SUB TOTAL*

-	-
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6300		Intra-Agency Sales of Supplies & Service	-	-
------	--	--	---	---

CONTROL ACCOUNT NO. 6300 SUB TOTAL *

-	-
---	---

6400	6401	Sale of Production	-	-
	6402	Sale of Property & Other Assets	-	-
	6403	Sale of Staff Services	-	-

CONTROL ACCOUNT NO. 6400 SUB TOTAL*

-	-
---	---

6500	6501	Interest	-	-
	6502	Dividends	-	-
	6503	Other	-	-

CONTROL ACCOUNT NO. 6500 SUB TOTAL*

-	-
---	---

6600		Gains (Losses) on Investment Trans.	-	-
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CONTROL ACCOUNT NO. 6600 SUB TOTAL *

-	-
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6900		Miscellaneous Revenue	-	-
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CONTROL ACCOUNT NO. 6900 SUB TOTAL*

-	-
---	---

GRAND TOTAL**

-	-
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*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Date (Initial) : March 26, 2015

Date (Final):

.ev. 6/14

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 IE & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME ZONE 6
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *
 TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications

ALL Proposers must provide the UNITS details even if their Programs are Cost reimburmments only

COST CALCULATIONS:	TOTAL	PROGRAM	COST
	PROGRAM	COST BY	PER
	UNITS	FUNDING	UNIT
	(A)	SOURCE	(C)
		(B)	
1. DHHS Program's Units and Costs	<input type="text" value="6,160.00"/>	\$ <input type="text" value="133,348"/>	\$ <input type="text" value="21.65"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
3. Total	<input type="text" value="6,160.00"/>	\$ <input type="text" value="133,348"/>	\$ <input type="text" value="21.65"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : March 26, 2015 DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Advocates, Inc.**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
ZONE 6	1	A	0
ZONE 6	1	B	0
ZONE 6	1	H	0
ZONE 6	1	I	0
ZONE 6	1	W	0
ZONE 6	2	A	0
ZONE 6	2	B	0.3935
ZONE 6	2	H	0
ZONE 6	2	I	0
ZONE 6	2	W	0
ZONE 6	3	A	0
ZONE 6	3	B	0
ZONE 6	3	H	0
ZONE 6	3	I	0
ZONE 6	3	W	0
ZONE 6	4	A	0
ZONE 6	4	B	0
ZONE 6	4	H	0
ZONE 6	4	I	0
ZONE 6	4	W	0
ZONE 6	5	A	0
ZONE 6	5	B	0
ZONE 6	5	H	0
ZONE 6	5	I	0
ZONE 6	5	W	0
ZONE 6	6	A	0
ZONE 6	6	B	0
ZONE 6	6	H	0
ZONE 6	6	I	0
ZONE 6	6	W	0
ZONE 6	7	A	0
ZONE 6	7	B	0
ZONE 6	7	H	0
ZONE 6	7	I	0
ZONE 6	7	W	0
ZONE 6	8	A	0
ZONE 6	8	B	0
ZONE 6	8	H	0
ZONE 6	8	I	0
ZONE 6	8	W	0

*If full-time equivalents (FTE's) are not based on 40 hours per week, specify: _____ Hrs/Week

% of Handicaped employees	0.00%
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Ethnicity % to total FTE
P: 6/14

A	B	H	I	W
0.00%	#####	0.00%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Advocates, Inc.**
 Disability/Target **Management Services Divison**
 Program Name **ZONE 6**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries	-	80,639
7100	Employee Health & Retirement Benefits	-	10,359
7200	Payroll Taxes	-	9,798
8000	Professional Fees	-	-
8100	Supplies	-	3,447
8200	Telephone	-	1,022
8300	Postage and Shipping	-	1,022
8400	Occupancy	-	9,496
8500	Rental, Maintenance & Depreciation of Equipment	-	2,044
8600	Printing and Publications	-	838
8700	Travel	-	340
8800	Conferences, Conventions, Meetings	-	136
8900	Specific Assistance to Individuals	-	-
9000	Membership Dues	-	170
9100	Awards and Grants	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)	-	14,037
9300	Client Transportation	-	-
9400	Miscellaneous	-	-
9500	Depreciation or Amortization	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	-	-
TOTAL EXPENSES		\$ -	\$ 133,348
0.00%	PROFIT FACTOR (for profit only)	-	-
TOTAL EXPENSES INCLUDING PROFIT		\$ -	\$ 133,348
TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		-	-
TOTAL DHHS REQUEST		\$ -	\$ 133,348

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**

Activity/Target **Management Services Division**

Program **ZONE 6**

2015 Prgm No. **MSD 001**

Facility Name **Community Advocates, Inc.**

Address **728 N. James Lovell Milwaukee, WI 53233**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	-
	7002	Professional Salaries	\$0.00	80,639
	7003	Clerical Staff Salaries	\$0.00	-
	7004	Technical Salaries	\$0.00	-
	7005	Maintenance Employee's Wages	\$0.00	-
	7006	Temporary Clerical Help	\$0.00	-
	7007	Student Stipends	\$0.00	-
	7008	Other Staff Salaries (Unclassified)	\$0.00	-
CONTROL ACCOUNT NO. 7000 SUB TOTAL*			\$ -	\$ 80,639
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$612.86
	7103	Medical & Hospital Plan Premiums	\$0.00	\$9,531.54
	7104	Pension or Retirement Plan Premiums	\$0.00	\$214.82
	7105	Supp. Payments to Pensioned Employes	\$0.00	\$0.00
	7106	Payments to Annuitants	\$0.00	\$0.00
	7107	Employment Termination Expenses	\$0.00	\$0.00
	7108	Employee Tuition Reimburse. Plan	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7100 SUB TOTAL*			\$ -	\$ 10,359
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$6,168.89
	7202	Unemployment Insurance	\$0.00	\$2,620.77
	7203	Workmen's Compensation Insurance	\$0.00	\$1,007.99
	7204	Disability Insurance Premiums	\$0.00	\$0.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$ -	\$ 9,798
8000**	8001	Medical & Dental Fees	\$0.00	\$0.00
	8002	Psychological Fees	\$0.00	\$0.00
	8003	Legal Fees	\$0.00	\$0.00
	8004	Rehabilitation & Education Fees	\$0.00	\$0.00
	8005	Development & Public Relations Fees	\$0.00	\$0.00
	8006	Brokerage, Commission, Collection Fee	\$0.00	\$0.00
	8007	Employment Fees	\$0.00	\$0.00
	8008	Audit Fees	\$0.00	\$0.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$0.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$ -	\$ -

* Must be the same dollar amount as shown on Form 3

** Attach a copy of the memorandum of agreement between the agency and the professional when using Control Account No. 8000, Sub-Account Nos. 8001 through 8012.

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A)	(B)	(C)	
		Account Description	2014 Gross Budget	2015 Gross Budget	
8100	8101	Medicine & Drugs (Clinic Use Only)	\$0.00	\$0.00	
	8102	Prosthetic Appliances (Clinic Use Only)	\$0.00	\$0.00	
	8103	Recreational, Voc. & Craft Supplies	\$0.00	\$0.00	
	8104	Food & Beverages	\$0.00	\$0.00	
	8105	Laundry, Linen, & Housekeeping Supplies.	\$0.00	\$0.00	
	8106	Office Supplies-Stationery, Typing	\$0.00	\$3,447.00	
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$0.00	
	8108	New Goods Purchased	\$0.00	\$0.00	
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	
	8110	Manufacturing Supplies	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$ -	\$ 3,447	
8200	8201	Telephone Expense	\$0.00	\$1,022.00	
	8202	Telegraph Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$ -	\$ 1,022	
8300	8301	Postage and Parcel Post	\$0.00	\$1,022.00	
	8302	Freight	\$0.00	\$0.00	
	8303	Messenger & Delivery Service	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$ -	\$ 1,022	
8400	8401	Office Rent	\$0.00	\$0.00	
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$805.00	
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$123.00	
	8404	Mortgage Interest	\$0.00	\$1,877.00	
	8405	Electricity	\$0.00	\$1,641.00	
	8406	Gas	\$0.00	\$0.00	
	8407	Heating Oil	\$0.00	\$0.00	
	8408	Water & Sewer	\$0.00	\$0.00	
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$891.00	
	8410	Real Estate Taxes	\$0.00	\$578.00	
	8411	Personal Property Taxes	\$0.00	\$0.00	
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$258.00	
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	
	8416	Depreciation - Buildings	\$0.00	\$3,323.00	
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$ -	\$ 9,496	
8500	8501	Equipment rental expenses	\$0.00	\$2,044.00	
	8502	Equipment Maintenance expenses	\$0.00	\$0.00	
	8503	Equipment - Depreciation	\$0.00	\$0.00	
	8504	Equipment - Interest Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8500 SUB TOTAL *			\$ -	\$ 2,044	

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.		2015 Prgm No. MSD 001		
Control Acct. No.	Sub-Account Number	(A)	(B)	(C)
		Account Description	2014 Gross Budget	2015 Gross Budget
8600	8601	Printing	\$0.00	\$838.00
	8602	Artwork	\$0.00	\$0.00
	8603	Photography	\$0.00	\$0.00
	8604	Recording	\$0.00	\$0.00
	8605	Films	\$0.00	\$0.00
	8606	Subscriptions-Periodicals/Publication	\$0.00	\$0.00
	8607	Purchase of Publications	\$0.00	\$0.00
	8608	Media Use Charges-Public Information	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8600 SUB TOTAL*			\$ -	\$ 838
8700	8701	Local Bus & Taxicab Fares	\$0.00	\$0.00
	8702	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	8703	Repairs - Company Vehicles	\$0.00	\$0.00
	8704	Insurance - Company Vehicles	\$0.00	\$0.00
	8705	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	8706	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	8707	Auto Allowance(Employees/Volunteers)	\$0.00	\$340.00
	8708	Tires - Company Vehicles	\$0.00	\$0.00
	8709	Hotel, Meals, & Incidental Expenses	\$0.00	\$0.00
	8710	Depreciation - Automotive Equipment	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8700 SUB TOTAL*			\$ -	\$ 340
8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$0.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$136.00
CONTROL ACCOUNT NO. 8800 SUB TOTAL*			\$ -	\$ 136
8900	8901	Medical Fees	\$0.00	\$0.00
	8902	Dental Fees	\$0.00	\$0.00
	8903	Medicines	\$0.00	\$0.00
	8904	Children's Board	\$0.00	\$0.00
	8905	Homemaker Service	\$0.00	\$0.00
	8906	Food Service	\$0.00	\$0.00
	8907	Shelter Service	\$0.00	\$0.00
	8908	Clothing Service	\$0.00	\$0.00
	8910	Recreation Service	\$0.00	\$0.00
	8911	Wage Supplements	\$0.00	\$0.00
	8912	Prosthetic Appliances	\$0.00	\$0.00
	8913	Hospital Fees	\$0.00	\$0.00
	8914	Testing Fees	\$0.00	\$0.00
	8915	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00
	CONTROL ACCOUNT NO. 8900 SUB TOTAL*			\$ -

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.		2015 Prgm No.	MSD 001
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget
9000	9001	Individual Dues	\$0.00
	9002	Organizational Dues	\$0.00
			(C) 2015 Gross Budget
			\$170.00

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ - \$ 170

9100	9101	Grants to Research Institutions	\$0.00	\$0.00
	9102	Graduate Fellowships	\$0.00	\$0.00
	9103	Trainee Scholarships	\$0.00	\$0.00
	9104	Other Scholarships/Tuition Payments	\$0.00	\$0.00
	9105	Allowance for Travel Under Grant	\$0.00	\$0.00
	9106	Allowance for Equipment Under Grant	\$0.00	\$0.00
	9107	Lump Sum Camperships	\$0.00	\$0.00
	9108	Contribution/Grants to Hum. Serv. Org	\$0.00	\$0.00
	9109-50	Awards & Grants to Indiv./Other Org.	\$0.00	\$0.00
	9151-99	Awards & Grants to Affiliate Organizat. (Misc)	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9100 SUB TOTAL * \$ - \$ -

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	14,037
	9202	Transportation		

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ - \$ 14,037

9300	9301	Local Bus & Taxicab Fares	\$0.00	\$0.00
	9302	Gas & Oil - Company Vehicles	\$0.00	\$0.00
	9303	Repairs - Company Vehicles	\$0.00	\$0.00
	9304	Insurance - Company Vehicles	\$0.00	\$0.00
	9305	Licenses & Permits-Company Vehicles	\$0.00	\$0.00
	9306	Leasing Costs - Company Vehicles	\$0.00	\$0.00
	9307	Tires - Company Vehicles	\$0.00	\$0.00
	9308	Depreciation - Auto Equipment	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9300 SUB TOTAL* \$ - \$ -

9400	9401	Employee Malpractice Insurance	\$0.00	\$0.00
	9402	Employee Bonding Insurance	\$0.00	\$0.00
	9403	Other	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9400 SUB TOTAL * \$ - \$ -

9500	9501-9504	Depreciation or Amortization	\$ -	\$ -
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See Accounts Related to the Statement of Expenses in the GUIDELINES.

9600	9601-9690	Allocations to Agencies,	\$0.00	\$0.00
	9691	Payments to Affiliated Organizations	\$0.00	\$0.00

CONTROL ACCOUNT NO. 9600 SUB TOTAL* \$ - \$ -

GRAND TOTAL*** \$ - \$ 133,348

* Must be the same dollar amount as shown on Form 3, on the line titled "TOTAL EXPENSES"

0.00

Date (Initial): March 26, 2015
Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Advocates, Inc.**
 Disability/Target Grp **Management Services Divison**
 Program **ZONE 6**
 Agency Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	(A)	(B)	(C)
	Revenue	2014 Rev. Budget	2015 Rev. Budget
4000	Contributions and Donations	-	-
4100	Contributions to Building Fund	-	-
4200	Special Events	-	-
4300	Legacies and Bequests	-	-
4500	Collected through Local Member Units	-	-
4600	Contributed by Associated Organizations	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	-	-
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5200	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DHHS)	-	-
5300	Revenues From HMO and PPO	-	-
6000	Membership Dues	-	-
6100	Assessments and Dues-Local Member Units	-	-
6200	Program Service Fees - Other	-	-
6300	Intra-Agency Sales of Supplies and Services	-	-
6400	Revenues from Disposal of Assets	-	-
6500	Investment Income	-	-
6600	Gains (Losses) on Investment Transactions	-	-
6700	Miscellaneous Revenue	-	-
TOTAL NON-DHHS REVENUE		\$ -	\$ -
DHHS CONTRACT REQUEST		-	133,348
TOTAL REVENUE		\$ -	\$ 133,348

Rev. 6/14

Date (Initial): **March 26, 2015**
 Date (Final):

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FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.**
 Facility/Target **Management Services Divison**
 Program **ZONE 6**
 Facility Name **Community Advocates, Inc.**
 Address **728 N. James Lovell Milwaukee, WI 53233**

2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Revenue Budget	(C) 2015 Revenue Budget
4000	4001	In-Kind Materials	-	-
	4002	In-Kind Services	-	-
	4003	Unrestricted Cash	-	-
	4004	Restricted Cash	-	-
	4005	Other	-	-
CONTROL ACCOUNT NO. 4000 SUB TOTAL*			-	-
4100		Contributions to Building Fund	-	-
CONTROL ACCOUNT NO. 4100 SUB TOTAL*			-	-
4200		Special Events	-	-
CONTROL ACCOUNT NO. 4200 SUB TOTAL*			-	-
4300	4301	Endowments	-	-
	4302	Trusts	-	-
	4303	Other	-	-
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	-
4500		Collected Through Local Member Units	-	-
CONTROL ACCOUNT NO. 4500 SUB TOTAL*			-	-
4600		Contributed by Associated Organizations	-	-
CONTROL ACCOUNT NO. 4600 SUB TOTAL*			-	-
4700		Allocated by Federated Fund Raising Org.	-	-
	4701	United Way	-	-
	4702	Other	-	-
CONTROL ACCOUNT NO. 4700 SUB TOTAL *			-	-
4800		Allocated by Unassociated and Non-Federated Fund Raising Org.	-	-
CONTROL ACCOUNT NO. 4800 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name Community Advocates, Inc.

2015 Prgm No.

MSD 001

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
5100	5101	Title XX-Milwaukee County (Do not include any DHHS Requests)	-	-
	5102	Title XX-Other Counties	-	-
	5103	Title IVA (AFDC Unemployment Actual)- Milwaukee County	-	-
	5104	Title IVA (AFDC Unemployment Actual)- Other Counties	-	-
	5105	Title IVA (WEOP) - Milwaukee County	-	-
	5106	Title IVA (WEOP) - Other Counties	-	-
	5107	51.42/437 - Milwaukee County	-	-
	5108	51.42/437 - Other Counties	-	-
	5109	Title I - Milwaukee County	-	-
	5110	Title I - Other Counties	-	-
	5111	Title III - Milwaukee County	-	-
	5112	Title III - Other Counties	-	-
	5113	USDA Food Stamps	-	-
	5114	Title XVIII - Medicare	-	-
	5115	Title XIX - Medicaid	-	-
	5116	Social Security and SSI	-	-
	5117	CIP Revenue from Milwaukee County DSD	-	-
	5118	CIP Revenue from Other Counties	-	-
	5119	COP Revenue from Milwaukee County DSD	-	-
	5120	COP Revenue from Other Counties	-	-
	5121	Wiser Choice /AODA voucher Revenue	-	-
	5122	Wraparound Milwaukee Revenue	-	-
	5123	Children's Court Services Revenue(CCSN)	-	-
	5124	Milwaukee County Depart. of Aging Revenue	-	-
	5125	Other	-	-
5126-99	Other Governmental Purchase of Service	-	-	
CONTROL ACCOUNT NO. 5100 SUB TOTAL *			-	-
5200	5201	Direct Federal Grants	-	-
	5202	Direct State Grants	-	-
	5203	Direct County Grants	-	-
	5204	Direct City and Municipal Grants	-	-
	5206	Title III Grants	-	-
	5210	Other Grants from Governmental Agencies	-	-
CONTROL ACCOUNT NO. 5200 SUB TOTAL*			-	-
5300	5301	Revenue from Title XIX-AFDC Clients	-	-
	5302	Revenue from Non-Title XIX Clients	-	-
CONTROL ACCOUNT NO. 5300 SUB TOTAL*			-	-
6000		Membership Dues - Individuals	-	-
CONTROL ACCOUNT NO. 6000 SUB TOTAL*			-	-
6100		Assessments & Dues-Local Member Units	-	-
CONTROL ACCOUNT NO. 6100 SUB TOTAL*			-	-

*Must be the same dollar amount as shown on Form 4.

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Advocates, Inc.** 2015 Prgm No. **MSD 001**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Revenue Budget	2015 Revenue Budget
6200	6201	Income from Private Pay Clients	-	-
	6202	Income from Title IVA (AFDC Employed Actual) Clients	-	-
	6203	Income from Title XX Clients (Direct Pay Portion Only)	-	-
	6204	Income from 51.42/437 Clients (Direct Pay Portion Only)	-	-
	6205	Income from Client Pick-up and Delivery Charges	-	-
	6206	Income from Client Insurance Carriers (Other than Medicare - Title XVIII)	-	-
	6207	Other Third Party Non-Governmental Income	-	-
CONTROL ACCOUNT NO. 6200 SUB TOTAL*			-	-
6300		Intra-Agency Sales of Supplies & Service	-	-
CONTROL ACCOUNT NO. 6300 SUB TOTAL *			-	-
6400	6401	Sale of Production	-	-
	6402	Sale of Property & Other Assets	-	-
	6403	Sale of Staff Services	-	-
CONTROL ACCOUNT NO. 6400 SUB TOTAL*			-	-
6500	6501	Interest	-	-
	6502	Dividends	-	-
	6503	Other	-	-
CONTROL ACCOUNT NO. 6500 SUB TOTAL*			-	-
6600		Gains (Losses) on Investment Trans.	-	-
CONTROL ACCOUNT NO. 6600 SUB TOTAL *			-	-
6900		Miscellaneous Revenue	-	-
CONTROL ACCOUNT NO. 6900 SUB TOTAL*			-	-
GRAND TOTAL**			-	-

*Must be the same dollar amount as shown on Form 4.

**Must be the same dollar amount as shown on Form 4, on the line titled "TOTAL NON-DHHS REVENUE"

Date (Initial) : March 26, 2015

Date (Final): _____

Rev. 6/14

FORM 5 TOTAL AGENCY ANTICIPATED EXPENSES

If you have a Federally approved indirect rate enter it here as %

AGENCY N Community Advocates, Inc.

Control Acct. No.	(A) Expenditure Description	(B) 2013 Actual	(C) 2014 Gross Budget	(D) 2015 Gross Budget	(E1) ZONE 1 (program) Gross Budget	(E2) ZONE 2 (program) Gross Budget	(E3) ZONE 3 (program) Gross Budget	(E4) ZONE 4 (program) Gross Budget	(E5) ZONE 5 (program) Gross Budget	(E6) ZONE 6 (program) Gross Budget	(F) Indirect Costs Gross Budget*	(G) Other Contracts Programs & Functions**
7000	Salaries	5,394,700	4,325,272	4,469,966	452,143	316,139	93,639	334,139	84,639	80,639	346,742	2,765,085
7100	Employee Health & Retirement Benefits	473,084	385,452	444,885	58,084	39,815	12,029	42,017	10,359	10,359	32,319	219,701
7200	Payroll Taxes	609,339	628,668	545,629	54,535	38,411	11,277	40,598	9,798	9,798	43,043	335,669
8000	Professional Fees	940,975	574,908	464,468	-	-	-	-	-	-	106,593	358,875
8100	Supplies	243,762	138,102	114,819	12,294	7,990	4,277	7,990	3,447	3,447	2,371	77,003
8200	Telephone	117,633	87,948	85,235	9,634	6,720	1,637	3,424	1,022	1,022	19,611	48,155
8300	Postage and Shipping	32,715	35,000	28,000	4,920	3,424	1,187	3,424	1,022	1,022	3,000	1
8400	Occupancy	945,282	1,096,645	1,039,550	45,708	31,813	11,028	31,811	9,496	9,496	120,178	778,029
8500	Rent, Maintenance & Depreciation of Equipment	523,287	250,492	229,950	9,840	6,649	2,374	6,549	2,044	2,044	24,011	166,939
8600	Printing and Publications	40,731	28,000	19,899	4,032	2,806	973	2,806	838	838	2,326	4,181
8700	Travel	112,871	110,524	85,461	1,640	1,141	396	1,141	340	340	2,500	77,963
8800	Conferences, Conventions, Meetings	76,216	109,926	41,291	656	456	158	457	136	136	6,000	33,292
8900	Specific Assistance to Individuals	1,519,820	1,269,106	1,184,091	-	-	-	-	-	-	-	1,184,091
9000	Membership Dues	21,102	19,000	18,995	820	570	198	571	170	170	10,659	5,835
9100	Awards and Grants	-	-	-	-	-	-	-	-	-	-	-
9200	Allocated Grant (From Inquest Cost Allocation Plan, if applicable) *	-	-	-	78,707	55,032	16,380	58,165	14,037	14,037	(717,753)	481,473
9300	Client Transportation	-	-	-	-	-	-	-	-	-	-	-
9400	Miscellaneous	106,653	103,718	66,500	-	-	-	-	-	-	3,000	63,800
9500	Depreciation or Amortization	-	-	-	-	-	-	-	-	-	-	-
9600	Allocation to Agencies, Payments to Affiliated Organizations	3,287,509	3,099,148	2,715,500	-	-	-	-	-	-	-	2,715,500
	TOTAL EXPENSES	14,526,421	12,200,728	11,535,328	733,414	511,168	156,573	533,392	133,348	133,348	0	9,335,085
	PROFIT FACTOR	-	-	-	-	-	-	-	-	-	-	-
	TOTAL EXPENSES INCLUDING PROFIT	14,526,421	12,200,728	11,535,328	733,414	511,168	156,573	533,392	133,348	133,348	0	9,335,085
	TOTAL NON-OHHS CONTRACT REV BROUGHT FWD	-	-	9,335,085	-	-	-	-	-	-	-	9,335,085
	TOTAL OHHS REQUEST	14,526,421	12,200,728	2,200,243	733,414	511,168	156,573	533,392	133,348	133,348	0	0

Rev. 6/14

Date (Initial):
Date (Final):
March 26, 2015

* Control Account Number 9200, Allocated Costs, column F, should be entered as a negative number in order for column D to cross-foot to zero.

** Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

FORM 5A. TOTAL AGENCY ANTICIPATED REVENUE

AGENCY: Miami Community Advocates, Inc.

Control Acct. No.	(A) Revenue	(B) 2013 Actual	(C) 2014 Revenue Budget	(D) 2015 Revenue Budget	(E1) ZONE 1 (program) Revenue Budget	(E2) ZONE 2 (program) Revenue Budget	(E3) ZONE 3 (program) Revenue Budget	(E4) ZONE 4 (program) Revenue Budget	(E5) ZONE 5 (program) Revenue Budget	(E6) ZONE 6 (program) Revenue Budget	(F) Indirect Costs Revenue Budget	(G) Other Contracts Proc. & Pass. Revenue Budget
0000	Contributions and Donations	370,784	380,000	185,000								185,000
0100	Contributions to Building Fund											
0200	Special Events											
0300	Legacies and Bequests											
4000	Collected through Local Member Units											
4000	Collected through Associated Organizations											
4000	Contributed by Associated Organizations											
4000	Allocated by Refused Fund Raising Organizations	483,222	465,333	473,425								473,425
4000	Allocated by Unattached and Non-Registered Fund Raising Organizations											
4000	Other Government Purchases of Services (DO NOT INCLUDE ANY REQUESTS FROM DBHS)											
5000	Grants from Other Governmental Agencies											8,411,642
5000	(DO NOT INCLUDE ANY REQUESTS FROM DBHS)	12,275,764	11,634,367	9,611,653								
5000	Revenues from BMO and PPO											
0800	Membership Dues											
6100	Assessments and Dues-Local Member Units											265,018
0200	Program Service Fees-Other			265,018								
0300	Intra-Agency Sales of Supplies and Services											
6400	Revenues from Disposal of Assets											
6500	Investment Income	59,131										
6600	Gains (and Losses) on Investment Transactions											
6700	Miscellaneous Revenue	287,296										
	TOTAL NON-DBHS CONTRACT REVENUE	13,477,117	12,200,720	9,315,085	733,414	511,168	155,573	533,972	133,348	133,348		9,315,085
	DBHS CONTRACT REQUEST			11,535,298	733,414	511,168	155,573	533,972	133,348	133,348		9,315,085
	TOTAL REVENUE	13,477,117	12,200,720	11,535,298	733,414	511,168	155,573	533,972	133,348	133,348		9,315,085

Date (Initial):
Date (Final):

* Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

Form 6 INDIRECT COST ALLOCATION PLAN
Summary Sheet

1 Agency Name: Community Advocates, Inc.
 2 Disability/Target Group: Management Services Division
 (Use additional copies of this form as needed.)

A	B	C	Form 6D	Form 6E	Form 6F	Form 6G	Form 6H	I
Account Number	Indirect Cost Account Description	Total Agency Indirect Costs Σ col (D) to col (H)	Direct Salaries Allocation	FTE Allocation	Square Footage Allocation	Direct Cost Allocation	Other Allocation	Unallowable Indirect Costs**
7000	Salaries	346,742	346,742					\$ -
7100	Employee Health & Retirement Ben.	32,519	32,519					\$ -
7200	Payroll Taxes	43,043	43,043					\$ -
8000	Professional Fees	105,593	105,593					\$ -
8100	Supplies	2,371	2,371					\$ -
8200	Telephone	13,611	13,611					\$ -
8300	Postage & Shipping	5,000	5,000					\$ -
8400	Occupancy	120,178	120,178					\$ -
8500	Rental & Maintenance of Equip.	24,011	24,011					\$ -
8600	Printing & Publications	2,526	2,526					\$ -
8700	Employee Travel	2,500	2,500					\$ -
8800	Conferences, Conventions, Meetings	6,000	6,000					\$ -
8900	Specific Assistance to Individuals	-	-					\$ -
9000	Membership Dues	10,659	10,659					\$ -
9100	Awards & Grants	-	-					\$ -
9200	Client Transportation	-	-					\$ -
9400	Other Miscellaneous (Specify)	3,000	3,000					\$ -
9500	Depreciation or Amortization	-	-					\$ -
9600	Allocations to Agencies	-	-					\$ -
	Interest							\$ -
	Bad Debt							\$ -
	TOTAL INDIRECT COSTS *	\$ 717,753	\$ 717,753	\$ -	\$ -	\$ -	\$ -	\$ -

* Individual line entries for Total Agency Indirect Costs (column C) should be entered on the corresponding respective line on Form 5, column F.
 ** Enter Agency Indirect Costs which may not be allocated to Milwaukee County Programs under Federal & State Cost Principles

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Form 6D DIRECT COST ALLOCATION PLAN
Allocation Basis: Direct Salaries

- 1 Agency Name: Community Advocates, Inc.
- 2 Disability/Target Group: Management Services Division
 (Use additional copies of this form as needed.)

A	B	C	(E1)	(E2)	(E3)	(E4)	(E5)	(E6)	L
Account Number	Indirect Cost Account Description	Allowable Total Direct Salaries Allocation *	ZONE 1 (program)	ZONE 2 (program)	ZONE 3 (program)	ZONE 4 (program)	ZONE 5 (program)	ZONE 6 (program)	Other Contracts Programs & Functions
7000	Salaries	346,742							
7100	Employee Health & Retirement Ben.	32,519							
7200	Payroll Taxes	43,043							
8000	Professional Fees	105,593							
8100	Supplies	2,371							
8200	Telephone	13,611							
8300	Postage & Shipping	5,000							
8400	Occupancy	120,178							
8500	Rental & Maintenance of Equip.	24,011							
8600	Printing & Publications	2,526							
8700	Employee Travel	2,500							
8800	Conferences, Conventions, Meetings	6,000							
8900	Specific Assistance to Individuals	-							
9000	Membership Dues	10,659							
9100	Awards & Grants	-							
9300	Client Transportation	-							
9400	Other Miscellaneous (Specify)	3,000							
9500	Depreciation or Amortization	-							
9600	Allocations to Agencies	-							
	Interest	-							
	Bad Debt	-							
	TOTAL INDIRECT COSTS **	\$ 717,753	78,707	55,032	16,300	58,165	14,037	14,037	481,473
	TOTAL DIRECT SALARIES	\$ 4,123,224	452,143	316,139	93,639	334,139	80,639	80,639	2,765,885

* Individual line entries for Total Direct Salaries Allocation (column C) come from the Indirect Cost Summary Form 6 (column D).

** Totals for each Program (columns D through K) should be entered in Control Account Number 9200, Allocated Costs on Form 3 (column C) for each Milwaukee County program. All other non-Milwaukee County contracts, programs & functions should be entered in column L, Total Indirect Costs, and carried to Form 5, column G.

As part of program budgeting, agencies which are contracted to provide more than one program are required to assign indirect costs to each program under contract. Describe the formula/method used to distribute indirect costs to programs.

Rev. 6/14

Date (Initial):

March 26, 2015 Date (Final):

Item # 28 Form 6

FORM 2 - 2015 AGENCY EMPLOYEE HOURS AND SALARIES

Agency Name: Community Advocates, Inc.

1 Position Title	2 Code	3 Sex	4 Ethnic Group	5 Handic Capabl	6 Hrs.	7 Yearly Salary	8 Hrs.	9 PROGRAM ZONE 1		10 PROGRAM ZONE 2		11 PROGRAM ZONE 3		12 PROGRAM ZONE 4		13 PROGRAM ZONE 5		14 PROGRAM ZONE 6		
								DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION	Salary	DISABILITY/ POPULATION
Enrollment Specialist	2	0.00	0.00	0.00	20	16,000.00	20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	1	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Enrollment Specialist	2	0.00	0.00	0.00	40	32,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	3	0.00	0.00	0.00	24	19,200.00	24	19,200.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	2	0.00	0.00	0.00	24	19,200.00	0	0.00	15,200.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	2	0.00	0.00	0.00	24	19,200.00	5	4,000.00	0	0.00	19,200.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	2	0.00	0.00	0.00	24	19,200.00	13	18,752.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	2	0.00	0.00	0.00	24	19,200.00	13	18,752.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utility Advocate	2	0.00	0.00	0.00	24	19,200.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	40	25,000.00	40	25,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	40	25,000.00	0	0.00	25,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	28	12,500.00	0	0.00	0.00	0.00	12,500.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	40	25,000.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	28	12,500.00	10	6,250.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Call Center Facilitator	2	0.00	0.00	0.00	20	12,500.00	10	6,250.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
SUBTOTAL OF HRS/SALARIES							664	499,700	136	96,204	64	44,200	39	27,700	306	236,200	61	46,700	21	46,700

Date (Initial):
Date (Final):

March 26, 2015

Rev. 6/14

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 288

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H Description of changes
			Actual level of Achievement					Actual level of Achievement		
<p>(All inputs apply to at least one or more activities.)</p> <p>Experienced Staff</p> <p>Eligible Clients</p> <p>All direct/indirect costs</p> <p>Program publicity</p> <p>Transportation information assistance</p>	<p>Public information</p> <ul style="list-style-type: none"> ◦ Public Service messaging (radio, spots, bus sides, etc.) will be used to publicize energy assistance program ◦ Informational fliers will be distributed and available at public buildings, offices and CBOs throughout Milwaukee County ◦ All information will include WHEAP identification, emergency and year-round contact numbers ◦ Information will accommodate LEP needs ◦ Staff facilitate transportation services 	<p>100,000 Milwaukeeans will hear/view public information about energy assistance</p>			<p>Potentially eligible clients become aware of energy assistance services</p>	<p>65,000 (100%) of potentially eligible clients increase awareness of energy assistance services</p>	<p>65,000 (100%) of potential clients achieve outcome</p>			

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 298

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report	
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes
Professional, respectful client-centered services at welcoming and orderly sites and for homebound Facilitated enrollment in Energy Assistance program	Outreach <ul style="list-style-type: none"> • Staff engage in effective outreach activities to maximize participation by targeted groups • Staff directly assists applicants 	65,000 eligible clients will receive mailed notices of energy assistance enrollment information 65,000 eligible clients will receive follow-up mailed notices of energy assistance enrollment information			Potential clients increase knowledge and select convenient appointment sites and times	65,000 (100%) of potential clients have the opportunity to schedule convenient appointments	65,000 (100%) of potential clients achieve outcome		
		20,000 eligible clients will schedule convenient appointments at central or neighborhood enrollment sites			Expected Outcome #1: Potentially eligible clients have had the opportunity to apply for energy assistance	65,000 100% of all potentially eligible clients have had the opportunity to apply for energy assistance	65,000 100% of potential clients achieve outcome		
		30,000 eligible clients will receive mailed postcard reminders of energy assistance enrollment information 15,000 Fixed Income list clients' applications will be completed or scheduled for completion by 10/1/2015			Expected Outcome #5: Fixed Income list have had calls for phone applications or appointments scheduled by the start of the energy season	15,000 100% of Fixed Income list have had calls for phone applications or appointments scheduled by the start of the energy season	15,000 100% of Fixed Income list clients achieve outcome		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

A B C C1 D E F G H

Inputs	Processes/Program Activities	Outputs	For evaluation report		Expected Outcomes	Indicators	Projected level of achievement	For evaluation report	
			Actual level of Achievement	Actual level of Achievement				Actual level of Achievement	Description of changes
<p>ADA Accessible</p> <ul style="list-style-type: none"> Neighborhood-based sites Central-CA Downtown Offices Zone 4 & 2 South-Robles Center offices Zone 4 & 6 North-CA Fond du Lac Zones 1 & 2 West-West Allis City Hall Zone 3 & 5 More than 100 Senelitta Sites and Flexible Mobile Sites ALL Zones (i.e., Pub. Library and branches, etc.) <p>Establishment of a web-based appointment/enrollment process for virtually all clients</p> <p>Efficient, no-wait or short-wait Central Call Center appointment scheduling</p> <p>Easy to use no-wait, On-line Appointment Calendar</p> <p>Referrals to Weatherization and other Urgent Needs Programs</p> <p>Access to enrollment in CA's Low Income Pilot</p> <p>Access to CA's more than 40 supportive services</p>	<p>Intake</p> <ul style="list-style-type: none"> Staff will visit senior center/housing sites and complete applications prior to start of energy season Staff promote and conduct easy, client friendly enrollment process Selected central and alternate sites will facilitate ease of access Site operation hours promote convenient enrollment to decrease wait time Clients select convenient daytime, evening or weekend appointments Staff conduct eligibility assessments for additional supportive services Staff accommodate all LEP requests and needs 	<p>10,000 Eligible seniors at housing sites are assisted to complete applications that meet guidelines</p> <p>10,000 eligible clients are assisted to complete applications that meet guidelines</p> <p>1,500 eligible clients will be enrolled in CA's LIP program</p> <p>65,000 clients will be assessed as eligible for Weatherization services</p> <p>65,000 clients will receive information and referrals to additional services</p>			<p>Expected Outcome #6: Senior center/housing sites have been visited or had dates scheduled for a site visit prior to the start of the energy season</p> <p>Clients receive assistance in completing energy assistance applications</p> <p>Eligible clients are qualified to receive Energy Assistance and Weatherization (if applicable)</p> <p>Clients become aware of and access additional services/benefits programs</p>	<p>10,000 (100%) of the seniors at housing sites have been visited and applications taken prior to the start of the energy season</p> <p>10,000 (100%) eligible clients will complete energy assistance applications</p> <p>65,000 (100%) of eligible clients will enroll and receive Energy Assistance and Weatherization (if applicable)</p> <p>65,000 (100%) of eligible clients will increase knowledge of other available services</p>	<p>10,000 (100%) of eligible clients achieve outcome</p> <p>10,000 (100%) of eligible clients achieve outcome</p> <p>65,000 (100%) of eligible clients achieve outcome</p> <p>65,000 (100%) of eligible clients achieve outcome</p>		<p>113 Community Advocates, Inc.</p>

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 298

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H Description of changes
			Actual level of Achievement	Actual level of Achievement				Actual level of Achievement	Description of changes	
State of the art computer technology and resident IT Department staff facilitating access to WHEAP system	<p>Complete and Process Applications</p> <ul style="list-style-type: none"> • Staff provide friendly, personalized assistance to clients in completing applications • Staff complete and process all applications in compliance with State guidelines • Staff accommodate all LEP requests and needs 	65,000 Verified client informations will be entered into the WHEAP system			WHEAP client application information will be complete and accurate	<p>65,000 (100%) of client apps. will be entered with accurate information</p> <p>65,000 (100%) of client apps. will be entered with accurate information to determine weatherization assistance</p>	<p>65,000 (100%) of eligible clients' completed applications achieving outcome</p> <p>65,000 (100%) of eligible clients' completed applications achieving outcome determining weatherization assistance</p>			

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 28a

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report	
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes
Crisis Assistance Funds Expedited appointment/enrollment Trainers Workshops Call Center and Crisis Assistance Staff	<ul style="list-style-type: none"> Staff will verify client eligibility Staff will verify that client applications are complete 	3,000 Crisis assistance clients will enroll in energy training workshops	For evaluation report	Actual level of Achievement	<p>Expected Outcome #2: Crisis assistance applicants will schedule an energy training/workshop in accordance with policy outlined in the Crisis Plan</p>	3,000 (100%) of crisis assistance applicants have been scheduled for an energy training/workshop in accordance with policy outlined in the Crisis Plan	3,000 (100%) of eligible clients achieve outcome		
	<ul style="list-style-type: none"> Staff will enroll crisis assistance clients in energy training workshops 	22,000 Crisis assistance clients will receive responses			<p>Expected Outcome #3: Requests for emergency assistance are responded to within 48 hrs. of receipt</p>	3,000 (100%) of crisis assistance applicants complete energy training/workshop	2,250 (75%) of eligible clients achieve outcome		
	<ul style="list-style-type: none"> Staff will respond to emergency assistance and life-threatening requests within the required time 	500 Emergency Request will be responded to in a timely fashion			<p>Expected Outcome #4: Requests made in a life-threatening situation are responded to within 18 hrs. of receipt</p>	22,000 (100%) of requests for emergency assistance are responded to within 48 hrs. of receipt	22,000 (100%) of responses achieve outcome		
	<ul style="list-style-type: none"> Staff will link crisis assistance clients with case management and other supportive services 	22,000 Crisis assistance will be linked with case management and other supportive services			Crisis assistance clients increase knowledge of supportive services	500 (100%) of requests made in a life-threatening situation are responded to within 18 hrs. of receipt	500 (100%) of responses achieve outcome		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 29a

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes	
Facilitated referrals to local weatherization agencies	Emergency Furnace Services <ul style="list-style-type: none"> Staff advise clients about qualifying for Weatherization Staff provide referrals to Weatherization agency Staff will process invoices and complete client file 	500 clients are referred to Weatherization program agency			500 (100%) clients will request emergency furnace services	500 (100%) clients receive emergency furnace services	500 (100%) clients achieve outcome			
Application and client file review	Fraud <ul style="list-style-type: none"> Staff record and report all suspected incident of fraud 	0 client records indicate fraud			0 (100%) suspected fraud cases will be reported	0 (100%) clients will be denied services because of fraud	0 (100%) of denials will achieve outcome			
Quality Assurance procedures in place and applied	QA <ul style="list-style-type: none"> Program files are reviewed for accuracy and compliance 	10% of all files will be reviewed			2-5 % error rating will be achieved	100% of all cases will have accuracy after QA review	95-97% of all files will be completed with accuracy and compliance	1		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 238

A Inputs	B Processes/Program Activities	C Outputs	C-1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H Description of changes
			Actual level of Achievement	Actual level of Achievement						
Management staff	<p>General Program Compliance</p> <ul style="list-style-type: none"> • Agency will meet with Milwaukee Co. staff to discuss program and performance standards • Agency will participate in quarterly Energy Strategic Planning Group meetings • Agency will send at least one employee to all State WHEAP meetings, training sessions and conferences • Reporting will be completed on a consistent and timely basis 	<p>1 (minimum) agency representative will attend all scheduled meetings and events</p> <p>1 agency representative will provide timely and accurate reporting</p>			<p>Agency representative will attend all meetings and events</p> <p>Agency will prepare and provide timely and accurate reports</p>	<p>1 (100%) agency representative will attend all meetings and events</p> <p>1 (100%) agency representative will provide timely and accurate reports</p>	<p>1 (100%) agency representative will achieve outcomes</p> <p>1 (100%) agency representative will achieve outcomes</p>			



**Response to RFP
Milwaukee County Department of Health and Human Services
Management Services Division**

Wisconsin Home Energy Assistance Program #MSD001

ADMINISTRATIVE ABILITY

Agency and Programs Management

Agency Experience

Community Advocates is a community-based social service organization that works with low-income and disabled individuals and families to ensure access to public and private programs and services that they may require to meet their basic needs. Founded in 1976, Community Advocates offer more than 40 programs that provide assistance in the areas of housing, utilities, health care, behavioral health and family violence. CA's Public Policy Institute advocates for sound and effective human services practices.

- Housing Advocacy programs provide a continuum of services ranging from emergency shelter to Rapid Rehousing and Homelessness Prevention which ensure safe, affordable housing for all. *Community Advocates was chosen in a competitive process as lead agency for homeless prevention program (Emergency Solutions Grant) administered and funded by the State of Wisconsin Department of Administration-Division of Housing Programs and as such provides coordination between all homeless service providers in Milwaukee County.*
- Heat & Utilities Advocacy programs provide outreach and enrollment services, crisis assistance and intervention to ensure continuation of necessary utility service. Services include budget and money management counseling to help clients establish and maintain payment plans that improve credit worthiness while facilitating establishment of a positive credit record with utility providers.
- Disabilities Advocacy programs assist clients in preparing SSI and SSDI applications and appeals.
- Behavioral Health programs provide protective payment services for homeless individuals and families who have severe and persistent mental illness and/or a dual diagnosis. The Division also operates Autumn West Safe Have for chronically homeless individuals who suffer from mental health and addiction issues and the Homeless Outreach Nursing Program that provides case management services to individuals living in unsheltered circumstances.
- CA's Milwaukee Women's Center Division operates emergency shelter for women and their children who are victims of domestic violence and is one of only two emergency shelters in Milwaukee County. Supportive services include children's programming, drug and alcohol addiction treatment and counseling, batterers' treatment, and Milwaukee's only shelter with programs serving victims of elder abuse. CA also operates an emergency shelter for homeless women and their families in same location which offers

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an array of supportive and benefits enrollment services that assist clients in regaining self-sufficiency and self-determination.

- Through its Public Policy Institute, CA administers and supports strategies to prevent and reduce child abuse and neglect, youth violence and delinquent behavior, youth alcohol and other drug use and abuse, and non-marital pregnancy.

Although the administration and management of this breadth of programming may appear complex, each Division's programs are woven solidly into an integrated services matrix designed to meet the basic and urgent needs of CA's customers. Each of CA's programs meets or exceeds projected client and service goals, provides timely and accurate reporting and displays responsible and transparent fiscal management.

Experience Providing Energy Assistance

For nearly forty years, Community Advocates has been working to help individuals, families and the elderly and/or disabled with issues concerning utility disconnections, reestablishing service, developing affordable payment plans, gaining access to resources for basic needs, providing energy management education and exploring whatever resources are necessary to maintain health and safety within their households. Community Advocates' Energy Assistance Outreach Program was created as a result of ongoing energy crises in the low-income communities of Milwaukee County. Since 1985, thousands of Milwaukee low-income families have been able to control their utility bills for heat and electricity by linking with Community Advocates. Through the Milwaukee Energy Network, Community Advocates has had a positive impact on resolving energy-related problems experienced by low-income Milwaukee residents.

Community Advocates has been a pioneer in providing advocacy for individuals, families and for the elderly and those with disabilities who have little voice and no experience in dealing with utility disconnections, service reestablishment, negotiating affordable payment plans, gaining access to basic needs resources and accessing energy management education and strategies. Community Advocates' renewed contracts to provide Energy Assistance enrollment, crisis services, the Energy Assistance Outreach Program, and public benefits services has helped maintain lifelines for Milwaukee County's most vulnerable populations.

Community Advocates has delivered energy assistance advocacy for more than 30 years and has operated its Milwaukee County Energy Assistance application and outreach program for 15 years with no quality assurance findings or corrective action plans. In 2011, CA proposed a transformative on-line scheduling and enrollment process. The results were reduced client wait times, faster client document retrieval and a more efficient use of staff resources. Outreach efforts targeted and reached Milwaukee's most vulnerable households. Crisis applications received were guaranteed priority service.

The proprietary scheduling and enrollment software developed by Community Advocates' IT staff allows for internal management and improvement while allowing clients to request energy assistance appointments and services from any computer terminal, at home, at the library or from a referring agency. A kiosk system installed in CA's lobby enables clients to easily type in basic information and the program will guide them through the process in short, understandable steps. CA is the only agency using this time-saving system. To augment the scheduling system, CA later developed an internal appointment screen that is used by

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Enrollment Specialists and Utility Advocates to identify the next client appointment, elapsed wait time, number of clients waiting and more. This allows the Enrollment Specialists and Utility Advocates to quickly assess client needs and direct them to the specific staffer as quickly as possible. The appointment screen lists all scheduled clients and walk-ins and identifies special and priority needs such as seniors, those with disabilities, non-English speakers and more. Enrollment Specialists and Utility Advocates can use the screen to identify and fill open appointment slots for new applicants. The system also records the amount of time the client spends with their advocate and matches the client name to staff so if a return visit is required, the client will be assigned the same staffer to provide expedited and more personalized service.

CA's Call Center Facilitators are trained to use the WHEAP system and are able to complete applications. Facilitators can close out incomplete applications increasing processing efficiencies and decreasing client wait time.

CA's dedication to identifying and serving all eligible households has resulted in enrollment and services that exceed required and projected outcomes. Although no official report has yet been issued, feedback from the State of Wisconsin DOA, Division of Energy Services Administration Monitors indicates that CA has exceeded expectations in customer service, meeting enrollment goals and in providing effective outreach to attract eligible clients who are using the service for the first time. CA's proprietary, client-friendly, web-based scheduling/enrollment program was especially praised for ease of use, secure and confidential client record keeping, efficiency, and the ability to quickly retrieve data for evaluation purposes.

The system itself is designed to be flexible and can be easily accessed at any location simply by using the linked, on-line enrollment process. All that is required is an Enrollment Specialist or Utility Advocate and a laptop. Applications can be completed in any setting or site. The system has proved especially useful for home visits as the specialist can arrive at an agreed upon time with a completed application that only requires a signature. Because of system portability and reasonable costs, the Wisconsin Home Energy Assistance Program could consider use of this web-based system by other counties or municipalities help establish consistent and simplified enrollment practices. The system has the capability to track appointments system-wide to prevent "agency shopping" (Individuals making multiple appointments.)

With the improvements implemented over the last contract period, CA has provided the following increased or new services.

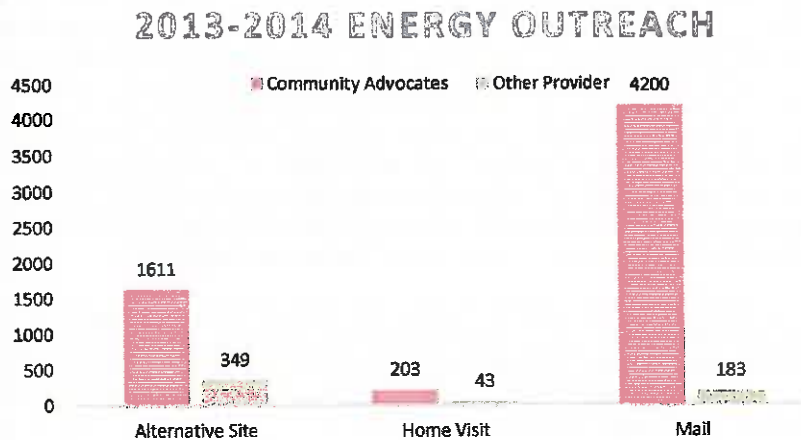
- From January 2014 through December 31, 2014, more than 30,000 individuals applied for either Energy Assistance or Crisis Assistance at our James Lovell site according to data collected using CA's Kiosk system
- CA increased its number of senior service sites from 51 to 66.
- In December 2014, CA began administering the emergency furnace program. To date, 41 referrals have been made to the weatherization agencies. Many of those served were first time applicants.
- In not heat situations CA has 24/7 on-call staff and deliver space heaters until a furnace vendor can be dispatched.

- An improved communication process was implemented between CA (WHEAP agency), Weatherization and Energy Assistance customers.
- For the 30,000 applicants in the 2014-15 Energy Season, CA completed 10,135 applications---more than one third of the total although contractually responsible for 25%.
- Through March 1, 2015, of the 10,135 applications, CA energy staff completed
 - 1,800 mail or phone applications for seniors and individuals with disabilities
 - 1,900 applications at senior sites
 - 105 applications were completed through home visits to seniors and individuals with disabilities
- At peak times, applicant wait times are less than 30 minute though most fall within CA's 15 minute target

[Please see Attachment B for examples of client service provision.]

Ongoing Internal Evaluation

Using State of Wisconsin data, Community Advocates also conducts ongoing, internal analyses to informally measure program outcomes to assess progress and that inform staff about necessary adjustments or improvements that will better serve our clients. The following graph charts 2013-14 outreach efforts to date.



SERVICE PLAN AND DELIVERY

Proposed Program Overview

Community Advocates is proposing to administer outreach, WHEAP regular and crisis benefits, WHEAP crisis assistance and furnace services to the six Service Zones established by Milwaukee County. CA's proposed scope of service is solidly based on effective current practices and will include improvements, innovations and modifications developed using "lessons learned" from years of practical management experience. All deliverable services will be available in each zone at times and locations that are most convenient and tailored to meet the specific needs of residents of that zone. Enhanced outreach activities will target low-income and underserved households with emphasis on reaching and informing those that include: the homebound elderly and disabled, young children, non-English speaking individuals, first-time applicants, and those who have been reluctant to apply because of social stigma.

During the last Milwaukee County Energy Assistance Program contract period, Community Advocates enlisted the support and collaboration of dozens of social service agencies and governmental entities to provide referral, outreach, and program access services. Of special note, CA engaged in Memoranda of Understanding with Milwaukee County Public Library and several of its branches to provide satellite enrollment sites as well as the services noted above. Through this experience, CA has identified strengths and weaknesses in choices of enrollment locations, ability to reach target populations and service hours.

- By analyzing each element of program service delivery, CA has determined that expansion of MOU agreements to include other partners will help improve access to Milwaukee County's energy assistance eligible households. Each was chosen because service focus includes thousands of low-income households and each has the ability to widely distribute outreach information, provide high volume enrollment sites, and share professional management experience. These include the Housing Authority City of Milwaukee (HACM), which owns more than 1,000 units of rental housing and manages over 4,000 units of low-income, including provision of 5,700 Section 8 vouchers. Hunger Task Force serves more than 9,000 individuals each month at the Robles Center (910 W. Mitchell St.). Their services include benefits enrollment (food share, Medicaid, social security benefits and general advocacy; and Milwaukee County Housing Division which administers Section 8 Housing Choice Voucher Program and through the Division's Special Needs department which provides permanent housing for individuals with disabilities who were previously homeless and are first-time applicants.
- Other supporting partners—the City of West Allis, Jomela Property Management Co. and Woodlands Condominium Complex have signed MOUs. Letters of support from of governmental departments, agencies and organizations—agreed to distribute outreach and informational materials, provide enrollments sites, coordinate efforts and do much more to assist Community Advocates in reaching target groups and all those households who qualify for services to ensure that program enrollment increases.

Outreach

Outreach and Enhanced Strategies

Community Advocates Energy Assistance staff will provide direct outreach services that maximize the participation of homebound households, including the elderly and disabled; households with young children; non-English speaking households; and those that are first-time participants that are unaware of the program or are reluctant to participate for various reasons.

Community Advocates will operate four permanent sites and over 100 enrollment sites distributed throughout the six service zones covering Milwaukee County. All are physically (compliant with ADA regulations) and geographically accessible to the targeted households. Community Advocates will have a combination of enrollment site structures including - **permanent sites** (open 5 days per week, scheduled hours of operation, extended hours in peak times); **satellite sites** (sites in an established locations, locally convenient with established but fewer days of operation and limited hours that are designed to meet client volume and reduce staff down time); and **flexible mobile sites** (portable service centers that can cover single, large locations or even a building and are available on a specific day, at any convenient time for applicant enrollment. Flexible mobile sites will be utilized in cooperation with management partners for large unit buildings, housing complexes and other locations in which residents are centralized).

Using the State-provided "Fixed Income List" Community Advocates will send postcards to all eligible participants. The postcard will identify the assisting case worker and state when they will be contacted for a mail or phone application. By providing the postcard, clients will know their appointment date, thus reducing uncertainties and multiple callbacks.

Community Advocates will continue and expand outreach to senior housing complexes. Energy Assistance staff will provide all necessary assistance in preparing and submitting the applications of persons at the site. To fully cover senior site scheduling, CA Energy Assistance staff will contact the site manager to set-up an enrollment date. Senior residents can sign-up on that day and CA staff will telephone to schedule an enrollment appointment. To determine how many staff to send, CA will adapt to client preferences and sufficient flexible staff hours will be dedicated to cover enrollments.

Public Information

Community Advocates plans to provide public information promotion that will reach the broadest possible audience. Efforts will include public service messaging, postcards, fact sheets, flyers, brochures, posters, etc. [Please see Attachment C for draft examples.] Materials will be distributed by CA and its referring agencies and be available at all outreach/enrollment sites. CA will use a combination of mailings, postings, on-site distribution and word of mouth. CA will be responsible for all inquiries regarding

Public Information materials will

- Publicize eligibility requirements, how to apply, location of application sites, times of operation, etc.

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- Publicize the availability of home energy assistance, crisis assistance and weatherization services
- Provide much needed "energy issues" information to Milwaukee County's community-based agencies; for-profit, low-cost and no-cost health care providers; elected and appointed officials; and low- and fixed-income consumers
- Provide energy information to potentially eligible groups and individuals by distributing printed materials. Materials will be produced to include and be accessible to eligible clients with limited or no English proficiency (LEP)
- Include press releases for the media, in coordination with TEAM MILWAUKEE, outlining eligibility criteria, application sites, documents needed for application, etc.
- Reference and identify the program as being administered by the State of Wisconsin Home Energy Assistance Program in all program materials on all published materials
- Include a contact phone number clients can call for heating emergencies and also use to access WHEAP information year-round
- Coordinate efforts with IMPACT 211 to manage after hour calls.
- Coordinate with other local program offices to facilitate distribution of WHEAP information and application intake when receiving other services
- Provide information on transportation to application sites

The following is a list of activities in the currently in use and Outreach Plan that will be developed in cooperation with Milwaukee County.

Community Advocates Energy Assistance Outreach staff will

- Arrange an early application period for identified target groups throughout Milwaukee County such as households with disabled persons, elderly persons, children under six, low-income and working poor who are experiencing energy burdens or are at-risk of energy disconnection.
- Provide home assessments upon request by agencies including Public Service Commission, Milwaukee County Department of Health and Human Services, Milwaukee County Department on Aging, utility providers and telecommunications companies, with in-house follow-up services.
- Provide energy outreach for the elderly and disabled residing in subsidized housing in Milwaukee County.
- Outreach to low-income Asian families by word-of-mouth (in our experience, the most effective method in this population) and by using bilingual brochures and fliers, community-based organizations serving the Hmong, Laotian and Southeast Asian populations
- Outreach to low-income Hispanic families by word-of-mouth and by using bilingual brochures and fliers, community-based organizations serving Latinos, Latino families and Latina populations
- Attend and present at resource and community fairs, outreach events.

To further support outreach efforts, a link to WHEAP information is prominently featured on Community Advocates' website home page. By clicking on "Energy Assistance", clients can access application requirements, application sites and hours of operations, emergency/afterhours information, and the Milwaukee WHEAP flyer. The site offers links to state WHEAP information and applicants can link directly to CA's online enrollment system.

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Enhanced Outreach through Partnerships

The following governmental departments, human service agencies and housing providers have signed Memoranda of Understanding with Community Advocates and will significantly improve CA's ability to provide outreach to thousands of eligible Milwaukee households.

- Housing Authority City of Milwaukee (HACM) Please refer to Attachment G for a map of all HACM housing sites that will be served by Community Advocates.
- Hunger Task Force
- Milwaukee County Department of Health & Human Services Housing Division

MOU partners have agreed to provide two or more of the support services and activities listed below allowing CA to draw upon the selected, varied and specialized experience of each.

- Assist in the coordination of the project
- Distribute outreach and enrollment information to tenants and customers
- Provide referrals of nonparticipating but potentially eligible energy assistance clients to Community Advocates
- Provide internet service and printing capabilities to Community Advocates staff at the Robles Center for assisting clients with energy assistance (Hunger Task Force)
- Identify available enrollment sites
- Collaborate on establishing days and time of operation, provide fully ADA accessible community room space and facilities at agreed upon sites

[Please refer to Attachment D for copies of each MOU.]

The following governmental entities, agencies, rental property management firms, etc. have agreed to provide a variety of collaborative efforts to support to Community Advocates in its proposed operation of the Milwaukee County Energy Assistance Program. The following have provided Letters of Support of MOUs.

- The City of West Allis
- Jomela Property Management of Milwaukee
- Milwaukee Public Library (various branch libraries)
- West Allis Library
- Hales Corners Library
- Woodlands
- Berrada Properties
- Heartland Housing's Maskani Place
- Neighborhood Community Centers throughout Milwaukee
- Centro Hispano Milwaukee

These collaborating partners have agreed to provide the following support either singly or in combination.

- Distribute outreach in energy assistance enrollment materials at various partner agency sites

- Permit Community Advocates to set up enrollment sites at central offices during peak traffic days
- Assist in identifying sites, days and times that best serve customer needs
- Include CA Energy Assistance enrollment information in communications to tenants and customers
- Provide enrollment sites either on a regular schedule or a temporary (high volume time) basis
- Accommodate and provide limited (but necessary) assistance to CA's Energy Assistance workers
- Open invitations to discuss additional ways in which partners can be of assistance

[Please refer to Attachment F for Letters of Support.]

Energy Assistance Program and Enrollment Services

Community Advocates is proposing to continue and improve the transformative and simplified web-based enrollment system introduced for Milwaukee County's Energy Assistance program. The system provides consistent client information and application scheduling and can be used in conjunction with more traditional access opportunities, i.e. phone requests, walk-ins and home visits. It has helped restructure and improve current home energy assistance enrollment, public benefits, crisis assistance and outreach services. This model respects the time constraints of clients and builds in efficiencies for the program administration and staff. This model respects the worth and dignity of each person by treating each as an individual and not a number.

Community Advocates has designed a web-based appointment screening and enrollment system that efficiently serves the majority of clients and has eliminated lines, has significantly shortened wait times, and allows for neighborhood access at locations and times that are convenient. Even though the system works, it is still somewhat underutilized and there is much to be done to encourage its use. Customers do not like change. Many clients are still willing to wait in line thinking that there is no other alternative. CA will begin a full-blown outreach program that will familiarize clients with the system. Kiosks in CA's lobby have been redesigned and entry screens have been simplified to encourage use.

Community Advocates has also identified and plans to locate primary and satellite sites in locations and areas that are most accessible to eligible clients based on analysis of eligible client demographics in the six service zones that will include CA's past experience in serving those areas. CA will offer daytime, evening and weekend scheduled service hours at all primary sites and satellite sites during peak seasons and daytime, evening and weekend appointments at primary sites year round. CA will introduce special scheduling for senior sites to coordinate with each location and accommodate regular activities or routines.

Meeting Customer Needs Through a Workable Enrollment Plan

Client survey results, client comments or complaints, staff review and observations and thorough research of Energy Assistance best practices influenced and provided the basis for the design of Community proposed Energy Assistance program. The common issues of dissatisfaction with the older Energy Assistance program enrollment process still predominate.

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As these are now more likely to be misconceptions rather than the norm at CA, we will focus proposed activities to ensure that clients understand these issues no longer exist within our program.

Collected findings indicate that some clients still believe they must

- Stand in line for hours
- Arrive as early as 5 am to get a number and then wait again
- Be treated like a number
- Become frustrated by long waiting times
- Sit in crowded waiting rooms
- Be turned away and have to return another day
- Answer the same question or provide the same information time and again
- Travel great distances
- Miss a workday

CA's model has achieved the following

- Eliminated lines
- Scheduled appointments
- Treats clients with respect and dignity
- Treats each client as an individual with particular sensitivity to cultural differences
- Reduced wait times and crowded waiting rooms by hours
- Reduced duplicative paperwork
- Eliminated missed workdays and unnecessary urgent childcare expenses
- Reduced travel distance and time
- Clean, friendly, professional atmosphere.

Additionally, CA discovered that County residents in southeastern, southwest and suburban areas residents are reluctant to come to a social services agency because of a perceived social stigma and fear of embarrassment. These households prefer mailed information, telephone applications or home visits to complete their enrollment process. CA's efforts in these areas will be tailored to clients' preferences understanding their reluctance while recognizing the positive impact benefits and assistance can have on their households. CA can honor the dignity and concerns of each applicant.

Continuation of Service and Implementation of Program Improvements

Program Model: Screening, Appointments and Enrollment

Community Advocates client friendly screening and enrollment process can be accessed on-line. *Whether a client uses their phone to reach the Call Center, or is helped by another agency to schedule an appointment, or choose to go online themselves—the web-based system facilitates and creates accurate, real time, coordinated appointment scheduling—with minimal or no waiting.*

Hunger Task Force, the Department on Aging, legal services, 2-1-1 and dozens of social service agencies make referrals and are given immediate access to an assigned Enrollment Specialist or Utility Advocate for their referrals. There is no wait time when the application is initiated by another agency at a remote location.

In 2011, CA estimated that approximately 85% of eligible clients would take advantage of on-line screening and appointments by accessing the system themselves, accessing the system with the help of a referring agency or case worker or by using Community Advocates Call Center. The remaining 15% of applicants would be those on the Fixed Income list and walk-ins who receive prompt, personal service for applications and for urgent assistance. These percentage estimates prove to be extremely helpful in determining ongoing service delivery and help indicate necessary modifications. [We urge Proposal Reviewers to log-in and visit the live system. Paste or type <https://www.ca-apps.org/basicneeds/energyassistance.aspx> into your browser to access the start page.

The On-line Screening Tool

The on-line screening tool is used to preapprove applicants who are potentially eligible. Clients (or a CA Call Center Facilitator or a representative/case manager from a referring agency) can input income for the last three-months, family-size and energy expenditure information. The client will then be directed to an appointment calendar screen. [Please refer to Attachment E for an example of the Screening Tool and examples of the Appointment Screens.] Clients can then make appointments for enrollment by clicking on a convenient location on the screen—times of operation are posted next to each site choice

A list of dates specific to each site appears and clients can click on an appointment time, type in required information and receive confirmation by return email. Clients making appointments using the Call Center will be entered into the same system and be asked to record appointment information and read it back to the Call Center Facilitator to verify. Clients will be advised on-line or by the Facilitator about required documentation that must be presented at the appointment. **Income verification will be confirmed by CA's Screeners prior to the appointment using the CARES database eliminating the need for the client to provide additional paperwork.** The same process is followed at satellite sites and for home visits so that all required information including income verification can be completed using CARES prior to visiting the client. Only a signature will be required to complete enrollment.

Enrollment Made Easy

The vast majority of Energy Assistance enrollments take from 10-15 minutes to complete. The on-line Appointment Calendar schedules at 15 minute intervals, include 10% overbooking at peak times (an industry standard), and, using normal attrition rates, will allow Enrollment Specialists and Utility Advocates to accommodate walk-in and crisis clients. CA will thus be able to serve all clients who need emergency assistance immediately and in-person.

CA has learned through experience that during non-peak enrollment times, appointments are more often missed. At these times, the overbooking percentage increases to ensure that all customers are served and that walk-ins can be slotted into no-show spaces easily. We accommodate five standbys at a time and, as each is served, the space is opened for another

walk-in or stand-by replacement. This maintains the highest level of customer service with no for staff.

We believe that this system will guarantee enhanced client service, at convenient locations and at convenient times.

Community Advocates proposed Energy Assistance Program will adhere to all required program components in addition to the program enhancements outlined above.

IT Support and Web-based Screening/Enrollment

The *On Line Appointment Maker* was developed by CA's IT department to provide easy, confirmable requests for information, screening and enrollment for potential Energy Assistance customers and staff. Requests for appointments at specific sites and for specific times informs CA about the need to increase staff at sites and at times experiencing heavy traffic, or decrease service at any given site or time to allow staff to travel to highly popular sites at times that are convenient to customers.

This plus the experience gained over the last contract period has allowed CA to modify hours and plan for staff relocation at satellite enrollment sites to maximize service in high-use area and decrease or eliminate sites with little or no traffic. This also has provided information about the need to use alternative methods, such as home visits, to increase participation.

The *On Line Appointment Maker* will be highlighted and easily identifiable on at <http://www.communityadvocates.net>, CA's website, where information about Energy Assistance will be available. Potential applicants will be encouraged to schedule an appointment to apply for assistance. When the browser selects "Click Here to Make an Appointment", the scheduling module will open.

The main features of the module are:

1. Customers can establish potential eligibility based on responses to two questions (household income and household size). The customer will receive conditional verification about eligibility. CA will stress that the verification is preliminary until final eligibility is determined by completing a full application. If potentially eligible, a new screen will appear.
2. A map of Milwaukee County is displayed with pushpins representing sites available for appointment. An applicant will be directed to select a site simply by clicking on the pushpin. Upon making a site selection, a new screen will appear.
3. This screen will list available dates/times for making appointments displayed in a table in ascending order by date. The client will be directed to select an open date and time. At this point, the potential applicant has selected a site, date and time.
4. A new page will then open requesting the individual to provide limited personal information (name, address, telephone number) so that staff can begin preparing the application in anticipation of the appointment. If the potential applicant enters an email address, an

appointment acknowledgement will be immediately sent with a reminder of the information the applicant must bring to the appointment.

[Please refer to copies of 'print screen' samples of web-based screening and appointment pages Attachment E.]

Additional improvements are included in this proposal based on customer and staff needs and requests. CA has added wall-mounted scheduling screens in the secure enrollment area. This allows the Enrollment Specialists and Utility Advocates to identify the next client appoint by name, elapsed wait time, number of clients waiting and more. Advocates can quickly assess required services and then direct clients to the specific staffer as quickly as possible. The appointment screen lists all scheduled clients and walk-ins and identifies special and priority needs such seniors, those with disabilities, non-English speakers and more. The system also records the amount of time the client spends with their specialist and matches the client name to staff so if a return visit is required, the client will be assigned the same staffer to provide expedited and more personalized service. The few times a customer is unable to complete an application and needs to return with additional information is given priority place in line and quickly enrolled. In addition, receptionist staff members have been WHEAP trained to close out incomplete applications.

We have also found that the *On Line Appointment Maker* has aided in internal program evaluation. We can now generate reports that help us increase productivity and analyze referral sources. We can then adjust staffing to accommodate high and low volume times and sites.

The following data categories are available for analysis and to assist in program evaluation.

- Number of clients
- Number of clients by name and program
- Number of repeat clients
- Number of referrals from specific agencies
- Client wait times
- Amount of time spent with Enrollment Specialist
- Match client to specific specialist
- Total time of visit

Lessons Learned and Proposed Program improvements

Following are several new or contributing features of Community Advocates' Energy Assistance program that we will either incorporate or modify to better serve our clients while continuing to meet the requirements of the program.

- Because of enormous outreach and enrollment success CA experienced at Milwaukee's senior sites, CA will now use same blanket approach in collaboration with our new MOU partners HACM, Milwaukee County Housing Division, Hunger Task Force, City of West Allis, Jomela Properties and Woodlands. (Please see details of planned collaboration on page 126 of this document.)

- We will continue to schedule hours and staff based on zone need and location of each enrollment site. We learned from the performance of our library satellite sites that, in some instances, there was insufficient traffic or site use to warrant participation. Others were either under or overstaffed to varying degrees. Corrective scheduling alleviated the problems but for this contract period, we anticipate using a more informed process and believe that staffing patterns and enrollment locations will better reflect client volume and appropriate office hours. Site selection within zones was driven by Milwaukee County's energy assistance enrollment reports and also by experience gained during the last contract period.
- CA's unique kiosk system has been retooled to a simpler sign in and online enrollment system. Because CA's web-based enrollment system was designed internally, it is extremely flexible and user friendly. When the clients first encounter the kiosk screen, they will see Guest Page 1. They simply click on Start and then will see Guest Page 2 where they select a Reason for Visit and then enter their first and last names. The system moves them through the appropriate process in the same easy format. Our IT staff also has the latitude to accommodate special services such as making outside referrals a priority. These system improvements are incorporated into our proposed service plan.
- CA also encountered rising missed appointments during non-peak season—almost 50%. We then adjusted our stand-by policy to a higher overbook rate so that scheduled appointments can be filled consistently and additional slots are available to walk-ins.
- CA will continue and even expand mail (including self-addressed stamped envelope) and phone applications although, on the surface, they may appear to be duplicative or inefficient. In fact, these enrollment methods expand CA's ability to reach those who cannot come to a physical location and also to those who prefer not coming in due to personal preferences. These applications will reach many elderly and first-time applicants who are unfamiliar with or reluctant to use the system.
- The mail or phone application is followed by a brief home visit so the client can sign their form and guarantees easy enrollment. CA proposes to use these methods as they help reduce traffic flow during busy seasons and allow reluctant clients to stay at home. A postcard will be mailed furnishing the client with the energy worker's name and the precise time of visit.
- CA also proposes that any senior or any client who is physically disabled and identified by sight in the waiting area be given priority service.
- During peak season, CA will not add to already extended hours as we have learned that past traffic patterns have indicated that this is unnecessary.
- CA will dedicate a staffer to help initiate a tracking system that will capture client and referral data, client and potentially, stakeholder comments and recommendations/criticism. A recently purchased telephone application will

automatically track calls, the contact person(s), time of day, length of call and response times. This additional information will again help CA in analysis and evaluation of the quality of customer service.

- To ensure that non-English speakers, households with young children, first time applicants and especially homebound elderly and those with disabilities have priority access to services, Community Advocates will provide direct marketing pieces that include a direct telephone line for applications. Callers who use this number will be asked a brief screening question to prevent abuse or "cutting in line" by those who do not meet these criteria but have managed to identify the number.
- Spanish speakers will also use a direct dial number to get immediate scheduling and/or enrollment.
- In the last contract period, Community Advocates estimated a wait time of 15 minutes for each client. CA's scheduling system confirms clients with scheduled appointments wait only 5-15 minutes—a significant improvement and less than that of other program providers. CA proposes to continue to provide this improved service.

Intake

Community Advocates Energy Assistance staff will provide intake services for all potentially eligible participants in Milwaukee's County's Energy Assistance and Weatherization Programs. To accomplish this, CA will use its established central Call Center staffed by facilitators who will be able to provide information, screening and schedule appointments for enrollment through CA's on-line screening and appointment system with special consideration given to customer service.

Call Center: Community Advocates is adept at managing the high volume of calls generated by the Energy Assistance Program. We currently have an NEC SV8100 system with the embedded Automatic Call Distribution (ACD) System. The ACD System allows Community Advocates to monitor the incoming call volume and respond quickly to ensure that 80%+ of Energy Assistance callers are answered within 35 seconds. This is based on two assumptions: reduced calls due to postcards and increased call center staff at peak times.

The system provides a real-time display for Supervisors providing valuable information about how long callers have been waiting along with agent information. The identifying system also allows referring agencies to receive priority service as agreed. Agents and Supervisors easily retrieve statistical information about the call queue by simply pressing a button on their phones. If callers hold times exceed a pre-determined threshold, such as 35 seconds, the system automatically sends alerts to agents and supervisors' telephone displays. Additionally, callers are presented with choices if they choose not to wait by being able to dial another extension or a voicemail box so agents can return the call. These capabilities all help in managing the callers experience to ensure a high level of customer satisfaction.

Supervisor's also have a wide range of reports to assist them in analyzing traffic by day, by hour, by agent, or how many calls were abandoned. These reports assist Community Advocates in providing adequate staffing levels at specific times of the day or days of the month to ensure that calls are handled within a timely fashion.

Utilizing our current experience with Energy Assistance Calls, our analysis indicates that our system and staffing model meets the best practice threshold identified and provides us the tools to adjust as call volumes change.

Community Advocates has designed a system of year-round and peak season flexible sites that will conveniently provide neighborhood access for Energy Assistance applicants in the six identified service areas that indicate the highest need and highest potential customer volume. Site selection is based on service area client eligibility (based on past applications) and identified potential client households. Sites have been selected to serve areas that can anticipate significant traffic and can also increase or decrease staff, days and hours based on actual client appointment scheduling. The site locations also consider reduced household eligibility and will be staffed accordingly.

Community Advocates can receive calls and messages 24 hours per day, 7 days per week and retrieves and returns calls in the order received within 1 business days.

Using Zone Enrollment Data to Drive Program Design

Advantage of Experience

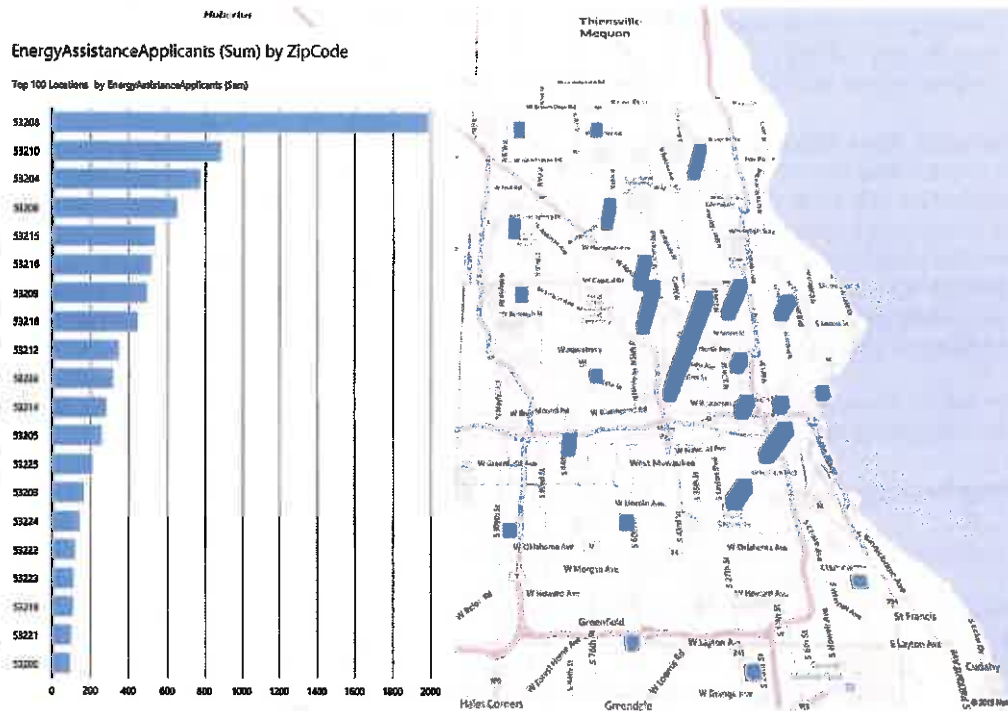
Using a combination of the data provided by Milwaukee County and Community Advocates' agency data, demographic information and experience collected in each of the six service zones, Community Advocates proposes to provide Energy Assistance services in each of those zones. We are well aware of customers' unique proclivities whether it be a preference to use a local enrollment site, one that is closer to their job, a small or large site, inability or reluctance to leave their homes, and many others. So CA recognizes that local areas sites will serve the vast majority of its residents but also acknowledge that boundaries can be fluid and services must be convenient to every customer.

According to data provided to Community Advocates by We Energies, energy assistance applications have increased 2-5% each year and the number of eligible households has increased slightly over the last five years. Numbers have remained stable no spikes no surprises. However the number of eligible non-enrollees is still high providing opportunities for better and more personal outreach tactics that will introduce the program to first-time applicants and the more reluctant clients. This indicates need to provide more targeted and effective outreach efforts and assistance to maximize the participation of ALL eligible households in Milwaukee County especially those in defined target households.

Community Advocates' realistic enrollment expectations are based on successful past experience and we can anticipate higher enrollment from the target households knowing that we can accurately project participation by employment of our proposed increased and more effective outreach efforts. CA knows its customers and, having previously served the eligible

households and target groups in all 6 zones, is secure that our enhanced outreach efforts and efficient enrollment procedures will increase participation in this contract period.

Tailored Enrollment and Service Delivery by Zone



The map above depicts Community Advocates’ current energy assistance enrollment volume by zip code and, therefore, can be correlated to reflect the minimum anticipated traffic in each of the six services zones. Using this current pattern in combination with the service numbers provided by Milwaukee County and taking special care to focus attention on High and Medium areas for Outreach, CA has developed a strategy that can provide information, schedule appointments and complete enrollment that will be tailored to meet the special needs of the populations residing in all six zones.

The following description of current and prior service, established needs and opportunities in each zone, supports Community Advocates’ action plan to organize efforts so that they maximize the impact of outreach efforts, address target populations, situate enrollment sites in the most convenient and accessible locations, thereby by increasing enrollment throughout Milwaukee County. Community Advocates will work with a combination of enrollment site structures including: **permanent sites** (open 5 days per week, scheduled hours of operation, extended hours in peak times); **satellite sites** (sites in an established locations, locally convenient with established but fewer days of operation and limited hours that are designed to meet client volume and reduce staff down time); and **flexible mobile sites** (portable service centers that can cover single, large locations or even a building and are available on a specific

day, at any convenient time for applicant enrollment. Flexible mobile sites will be utilized in cooperation with management partners for large unit buildings, housing complexes and other locations in which residents are centralized).

Zone 1

Zip	Number of Applications	Outreach Frequency	Enrollment Area	Percent of Total App	Portion of Budget
53210	4021	High	Yes		
53216	4730	Med	Yes		
53218	5169	Med	Yes		
53222	1221				
53223	2207				
53224	1930				
53225	2650				
ALL	21928			33%	\$ 733,414

As Zone 1 is currently the highest enrollment area, Community Advocates will maintain current successful enrollment activities and direct increased outreach efforts in zip codes 53210, 53216 and 53218. Working in collaboration with partner sites in this zone, we anticipate reaching the vast majority of first-time applicants and target households.

Site Location Advantages

An agency owned facility, CA's **permanent enrollment site at 4906 W. Fond Du Lac Ave. (53216)** is the most central location in this zone and is located within the three highest application areas by zip code. The location also provides ample parking in a private lot. Three years ago CA processed over 9,000 applications at the site alone with no marketing efforts to speak of.

Community Advocates has a 10 year history of enrolling residents on the fixed income list from this location. The facility provides 10,000 sq. ft. dedicated to energy assistance enrollment and services only. This location is especially convenient for clients who have appointment and walk-ins. As this zone also contains the highest vulnerable populations, Enrollment Specialists will focus heavily on mail/phone applications as will they will in all other zones.

Woodlands [flexible mobile site] Woodlands (53224), a 500+ condominium complex that is located on the northwest border of Zone 1, will provide access to their ADA community resource room during rent collection times and during peak season. As tenants arrive to pay their rent, they have the convenience of enrolling at the time and at the same location. Woodlands will distribute outreach information and enrollment schedules to their tenants in their regular communications.

Westlawn [flexible mobile site] (53218) Housing Authority of the City of Milwaukee (HACM) owns and manages Westlawn, formerly Wisconsin's largest public housing development. First developed in the 1950s, the 75-acre development on Milwaukee's northwest side has provided critical affordable housing and is now being revitalized for 21st century

housing and community needs. Community Advocates will set up an enrollment site in their offices during rent collection times and during peak season. As tenants arrive to pay their rent, they have the convenience of enrolling at the time and at the same location. HACM will distribute outreach information and enrollment schedules to their tenants in their regular communications.

Berrada Properties [flexible mobile site] In 53223 and 53225 Berrada owns the majority of affordable apartment units in these zip codes. Community Advocates will partner with them to set up enrollment sites at rent collection time and, during peak season, they will include flyers when they mail resident's rent slips.

Library Branches and other supportive entities **[satellite sites]** Many libraries, childcare facilities and shopping areas in Zone 1 have agreed to conduct outreach during non-peak seasons.

Off-site and additional efforts

Community Advocates will provide additional outreach to target groups by encouraging mail and telephone applications and make specialized accommodations to ensure enrollment:

- Schedule home visits and mail phone apps during nonpeak season
- Send information to eligible households informing them they can expect a call from an assigned and named Enrollment Specialist to help them complete a mail or telephone application

On March 1, 2015, an outreach report revealed that 10,000 of the 21,000 households with no payment history during the winter months wait until after March 1 to come in to apply for crisis and energy assistance. Community Advocates plans to ramp up staffing in this Zone from March –May 15 to meet the demand.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines.

Zone 2

	Number of Applicants	Outreach	High Population Area	Percent of Total App	Portion of Budget
53206	4968	High	Yes		
53209	6430	Med	Yes		
53211	421	High			
53212	3558	High	Yes		
53217	243				
ALL	15620			23%	\$ 511,168

Site Location Advantages

CA's permanent enrollment site at **4906 W. Fond Du Lac Ave.** is will serve as the primary **permanent site** for Zone 2 as it adjoins zip codes 53206 and 53209. The site will actually provide continuity of service as many Zone 2 households already are familiar with the location and services. All Zone 2 zip code residents can access a bus line directly to the Fond du Lac location. Use of this facility will also result in decreased costs by not duplicating a heavily-used and effective site.

MOU partner, **HACM** owns and/or manages 1,000 subsidized units in three housing complexes in this zone. Community Advocates will operate **flexible mobile sites** at the **HACM** properties that will follow schedules to coincide with tenant certifications and resident meetings. Again the convenience of Community Advocates flexible siting can encourage and increase enrollment of eligible households.

Heartland Housing's Maskani Place [satellite site] 320 E. Center Street (53212) Community Advocates currently conducts outreach activities at this 37 unit site and proposes to provide a **flexible mobile site** and continue outreach in the next contract period.

Library Branches and Community Centers [flexible mobile sites] in (53212) Community Advocates currently conducts outreach programs in these locations and will continue efforts in the next contract period. In the past, response has been adequate but there is ample room to increase outreach and use flexible, alternative enrollment siting to attract eligible applicants to a non-threatening and familiar location.

(53211) This is a zip code area in which it is known that many residents are reluctant to enroll at a social services agency because of the stigma attached. For this reason, a permanent or even a regularly scheduled site is not warranted.

Even though this zip code has the second highest vulnerable population, "asking for help" or receiving benefits is a situation that must remain private. CA will blanket this zip code with mailed and posted information encouraging residents to use the mail or telephone application process. Home visits can serve as follow-ups and private enrollment opportunities. A number of large apartment buildings are located on the east side and would be prime locations for **flexible mobile site** enrollments.

Off-site and additional efforts

- 8,000 of the 15,620 eligible households apply within the last two month of the energy season.
- Therefore, during non-peak time, energy assistance staff will concentrate on mail/telephone applications.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines.

Zone 3

	Number of	Outreach	High Application Area	Percent of Total App	Portion of Budget
53213	438	High			
53214	1902	Med			
53219	1592				
53226	267				
53227	774	Med			
ALL	4973			7%	\$ 155,573

Site Location Advantages

Community Advocates will maintain a **permanent enrollment site** in the **West Allis City Hall 7525 W. Greenfield (53214)**. The site will maintain regular hours that are convenient to the majority of local applicants. The site will welcome all customers, those with appointments, stand-bys and walk-ins. This zip code was the highest trafficked zip code in the last contract period but still has the need for additional outreach which CA will conduct in cooperation with the City of West Allis. In addition, the city operated the HPRP (homeless prevention activities) for three years and has an established a congenial relationship with the working poor and low-income individuals.

West Allis Library at 7421 W. National Ave. (53214) and Hales Corners Library at 5885 S. 116th St. (53130) will serve as flexible mobile sites. This level of on-site service is more than adequate to serve those with appointment and walk-ins as the volume is quite low.

Low-income housing (10) and senior sites (throughout West Allis and Hales Corners) Community Advocates currently conducts outreach and enrollment at these sites and proposes to continue throughout the next contract period.

Subsidized Housing and Voucher units (throughout West Allis) Community Advocates has an agreement to work with the City of West Allis, which manages more than 1,000 units, to arrange site visits to help increase enrollment for eligible residents.

Both of the sites noted above may be used as **flexible mobile sites** with hours and times announced well before the site visit. As this zone has a very low rate for missed appointments, CA has determined that the number of proposed sites and levels of service is appropriate to achieving the best enrollment results.

Off-site and additional efforts

- Even though this zone has the second lowest population of individuals and households living below the federal poverty level, there are an increasing number of elderly residents eligible for energy assistance. This group is also averse to admitting need and will most likely never use a walk-in service. This population will be CA's focus for outreach effort, mail and telephone enrollment and will be further targeted for home visits.

- As of March 15, 2400 households had not applied, per the outreach report mentioned previously. Over 70% live in apartment buildings. CA has determined that targeted Outreach will be efficient and effective. There were three trailer parks are home to hundreds of individuals who have yet to apply. Marketing the program and completing applications would be simple for this population by using a **flexible mobile site** operation. CA project that there will be more applications, fewer incomplete applications due to missing information, and residents do not have to travel. CA staff can setup anywhere within minutes as has been proven by our 10 years of experience taking enrollments at senior sites.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 4

Zip	Households	Outreach	Application Area	Percent of Total App	Portion of Budget
53202	481	High			
53203	49	Med			
53204	4344	High	Yes		
53205	1409	High			
53208	3796	Med	Yes		
53215	5207	Med	Yes		
53233	987	High			
ALL	16273			24%	\$ 533,392

Site Location Advantages

Community Advocates will maintain two permanent sites in this zone to meet the heavy demand (three high use zip codes and significant outreach needs) and to provide a convenient location that is experienced and adept at assisting Spanish speaking households.

Community Advocates headquarters [permanent site] at James Lovell St. and Wisconsin Ave. (53233) provides the single most convenient access point for the majority of our clients, and, indeed is accessible to most Milwaukeeans. It is convenient to the only central hub for all Milwaukee County Bus lines. The building is equipped with a large and comfortable waiting room, well-designed offices, private interview rooms, and provides a professional environment that is both welcoming and client-centered. Clients can conveniently combine visits with appointments at the Court House, City Hall, County Services and state and federal offices. Moreover, CA offers private, ample, adjacent parking to our clients at no cost. All of these amenities certainly provide an impetus for clients to choose CA's downtown location for Energy Assistance in addition to the availability of other services.

CA's main offices are located in the heart of Zone 4 at zip 53233, which according Milwaukee statistics is home to the highest percentage of residents at or below the federal poverty level.

The location is open during all regular business hours and schedules weekend and extended hours during peak season.

The Hunger Task Force has entered into a Memorandum of Understanding with CA to provide a primary **permanent site** in this zone at the **Robles Center 910 W. Historic Mitchell St. (53204)**. Robles Self Service center features enrollment and benefits applications, including food share, medical services, social security benefits and more. The Center is an extremely high-trafficked facility. In addition, Hunger Task Force serves more than 9,000 customers each month through other programs and will advertise Energy Assistance. At this site, Hunger Task Force serves a largely Latino population with a high percentage of households that have never applied for energy assistance and has agreed to market the program widely throughout the zone using materials specifically designed to attract this very underserved population. HTF has Spanish speaking staff available for interpretation. CA will hire bi-lingual and Spanish speaking staff as Enrollment Specialists and Utility Advocates.

Community Advocates began enrollment at Robles two weeks ago and a full 50% of households had not applied. A high percentage of those were also non-English speaking. Advocates noted that clients who had applied in the past had used the Chase location but were very eager to use this location for its convenience. Many recalled the old energy assistance site at 9th St. and Madison which had been the busiest of all sites.

Large SRO (single room occupancy units) and community one-bedroom apartments surround the area. Jomela Properties and HACM own a large portion of the low-income apartments in Zone 4 and CA will work with both groups to finalize outreach plans. In addition to the large-scale Robles Center, CA will work with HACM and Jomela Properties to schedule site visits. Jomela will provide space in its main offices for from the 1-5th when renters come in to accommodate a **flexible mobile site**. The company will post information and include enrollment information in all tenants' mailed rent slips. CA will work with Jomela to determine appropriate incentives and provide these to first time applicants.

Zone 4 is home to a very high volume of individuals with mental health issues and those who have been chronically homeless (homeless for at least one entire year or four instances of homelessness within a three year timeframe). Even though the formerly homeless may now reside in permanent housing, program awareness is minimal. And many others have never applied due to their mental illness. This area will be best served by these site visits as these individuals and households may need to more "hand holding" and coordinated efforts with apartment building managers.

Off-site and additional efforts

Community Advocates will conduct concentrated outreach efforts as the need in all zip codes is High or Medium. It is imperative that we get the word out and provide the flexible enrollment sites that will augment the large-scale efforts at the Robles Center.

- The Hmong Friendship Association will continue to serve the increasing Hmong population in this area with information, outreach, enrollment services and referrals to Community Advocates.

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- Centro Hispano Milwaukee is a CA partner in Zone 4 and will conduct outreach activities targeting their Spanish-speaking households.
- CA is also exploring the dozens of outreach opportunities that exist at back to school festivals, the numerous community centers, daycares, and churches.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 5

Area	Population	Category	Area	Total	Funding Budget
53129	266	High			
53130	125	High			
53132	403				
53220	987	Med			
53221	1906	Med			
53228	290	Med			
ALL	3977			6%	\$ 133,348

Site Location Advantages

As Zone 5 is the smallest zone and a low volume area. Community Advocates proposes to use targeted outreach mailings and postings encouraging additional mail and telephone applications. Most current recipients in the zone are already familiar with the telephone application process and watch their mail for the postcard. If a **satellite site** is required, it will be limited to one in the 53221 zip code area with a schedule and hours sufficient to cover all in-person enrollments. As in previous contract periods, CA will work with the libraries to schedule appointments and collaborate with the health department to provide energy assistance outreach and marketing materials.

CA will use **flexible mobile sites** as a large number of senior site are located in this area and these clients rarely wait until the last minute. When their postcard arrives, they are prompt in responding and will arrive at their scheduled time or wait for their site visit. CA has an 85% appearance rate for apartment site visits.

However, even though the numbers are low, the outreach opportunities are high in that this population is, once again, reluctant to visit a site that they perceive will mark them as "needy". To date, 745 applications have not been completed in 53221.

Zone 5 is an area saturated with affordable safe housing. Community Advocates will work with local landlords informing them of the benefits to their clients. Energy assistant eligibility and weatherization eligibility is good for both. CA plans to identify additional apartment managers to schedule visits and utilize their offices for marketing.

One of the primary advantages of **flexible mobile sites** is that customer flow is controlled and staff does not have to wait around for customers. They are busy the entire time and staff costs are kept to a minimum. Appointments are scheduled weeks in advance to determine staffing needs. Current sites offer free conference space for energy assistance workers also saving on permanent site costs.

Because enrollment is done in the comfort of a familiar location, clients are much less likely to feel stigmatized. All paperwork is completed on site resulting in very few incomplete applications.

There is little need for more than the available on-street parking and convenient parking lots are attached to the library sites and there is access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 6

Site ID	Population	Area	Percentage	Total
53110	958	Med		
53154	738			
53172	843			
53207	1383			
53235	396	Med		
ALL	4318		6%	\$ 133,348

Site Location Advantages

Robles Center (53204) will serve as the **permanent site** for Zone 6 since the majority of activity in this zone originates within zip code 53207—only 1-5 miles from the Center. Zip code 53204 is directly adjacent to 53207 and is actually closer to targeted client populations than a more central zone 6 site. The balance of Zone 6 will best be serviced by outreach and **flexible mobile sites** due to high appearance rates at apartment complex site visits.

Zone 6, especially zip code area 53207, is predominately Latino and CA's experience indicates that clients prefer a site closer to the areas that they frequent. The other zip codes include substantial elderly and low income housing complexes. Jomela Properties owns and manages many properties in this area and will partner with Community Advocates to provide support and services similar to those described in Zone 4.

Community Advocates currently conducts successful site visits at several senior sites and has established positive relationships that took years to nurture.

There is some need for additional outreach for this area and the availability of the Robles Center fills the need for a stable site that is convenient for individual enrollment. Zone 6 will also benefit from CA's plan to increase postcard notification and scheduled appointments.

There are several libraries in Zone 6 that have been used as temporary sites. CA proposes to set up **flexible mobile sites** in the libraries that are open on days and during hours that are convenient to the clients.

Off-site and additional efforts

As is the case in the Zone 5, there will be a concerted effort to meet the customers "where they live" by partnering with landlords to provide enrollment sites energy while promoting weatherization.

CA's current site is very busy simply because there are fewer options on the near south side where there are the most concentrated areas of poverty and energy assistance recipients. CA will increase post card notification, use **flexible mobile sites**, and explore additional outreach opportunities that exist at numerous community centers, in cooperation with the health department and at churches.

There is little need for more than the available on-street parking and convenient parking lots are attached to the library sites in most of Zone 6. Few parking needs are apparent when operating flexible mobile sites and there is access to Milwaukee County Transit System bus lines. Robles Center has ample parking available for residents of zip code 53207.

Program Operation

The following sections address the Required Program Inputs, Processes, and Program Activities listed in the Program Operation section of the RFP and correspond to the components included in Community Advocates Energy Assistance Program Logic Model. [Please refer to "Logic Model" on page 111.]

Service Sites: The primary year-round, central, full-service location will be located at our main offices in downtown Milwaukee. Community Advocates new headquarters at James Lovell St. and Wisconsin Ave. provides the single most convenient access point for the majority of our clients, and, indeed is accessible by most Milwaukeeans. It is convenient to the only central hub for all Milwaukee County Bus lines. The building is equipped with a large and comfortable waiting room, well-designed offices, private interview rooms, and provides a professional environment that is both welcoming and client-centered. Clients can conveniently combine visits with appointments at the Court House, City Hall, County Services and state and federal offices. Moreover, CA offers private, ample, adjacent parking to our clients at no cost.

Three additional year-round sites will operate in areas that serve Milwaukee's north and south side neighborhoods. Each is completely ADA accessible and provides a professional, client-friendly atmosphere. Free parking for clients is available at both sites and both can be easily accessed using public transportation. All year-round sites will publicize a schedule of evening and weekend hours in addition to normal business hours that will serve clients during peak enrollment seasons and to flexibly accommodate other high volume time periods.

Further, CA plans to operate satellite sites and flexible mobile sites that will provide convenient, flexible hours in neighborhoods most in need of local, evening and weekend service. Sites will be operated on a flexible schedule that best accommodates client needs and will provide staffing that increases or decreases according to demand. Each site is easily accessible and includes free client parking.

All four primary sites are completely ADA accessible and, because of complete compliance with federal law, all library branch satellite sites afford the same or even enhanced accessibility.

Community Advocates Energy Assistance staff will qualify applicants for Weatherization services and provide enrollment information.

Weatherization: Community Advocates Energy Assistance staff will ensure that a client's Energy Assistance enrollment is complete, thus qualifying the client for Weatherization. Weatherization services are available to qualified low-income individuals. Weatherization identifies energy waste and provides cost-effective, energy-saving measures and education to residential households. The energy saving measures and education offered by Weatherization includes but are not limited to: attic, sidewall, and crawl space insulation; air infiltration, heating system, refrigerator, and water heater replacement; duct work and participant education. The services offered result in more energy-efficient, comfortable and safer homes. Community Advocates EA staff will also work in conjunction with local Weatherization agencies to establish potential eligibility of owners of large apartment or assisted living facilities and ensure they are aware of enrollment procedures and weatherization requirements. Community Advocates will continue its ongoing working relationships with Milwaukee's local weatherization operators. Staff will provide clients with information and the name, phone number and address of the local weatherization operator for further service.

Complete and Process Applications

Community Advocates' Enrollment Specialists and Utility Advocates will

- Take applications and assist applicants in completing the Home Energy Plus (HE+) applications
- Accept applications at Community Advocates corporate offices, primary sites or at satellite locations including eligible participants' homes if such accommodations increase ease of access for homebound household and other targeted groups
- Will take applications throughout the year to establish eligibility for Pro-Active Crisis Assistance and Weatherization Assistance after the heating season is over, and for regular energy assistance benefits and emergency assistance during the heating season
- Receive referrals from Milwaukee County Energy Assistance staff for Milwaukee County residents who are potentially eligible for Energy Assistance
- Prepare on-site emergency and regular energy assistance applications for energy consumers at all Community Advocates Energy Assistance sites
- Verify application information and review supporting documents to certify the application is accurate

- Enter all applications into the WHEAP system within 30 days of the application in chronological (date) order assuring applications are complete and resolving application and check issuance problems
- Enter into the WHEAP System within 30 days those applications taken in a multifamily building by the local weatherization program operator to achieve the number of eligible dwelling units needed to make the building eligible for weatherization assistance
- Comply with State guidelines when processing applications from employee relatives and friends

Crisis Assistance

Maintaining energy service is a critical basic need for all households, especially in Wisconsin where winter can bring life threatening temperatures and weather conditions. The State of Wisconsin, local government organizations, and utility providers throughout the State administer programs and regulations designed to assist low-income customers with retaining and obtaining utility services. Even with firmly established programs and services, last year, We Energies had to notify tens of thousands of Milwaukee County households that they were subject to disconnection. Milwaukee County's Energy Assistance Crisis Services helps consumers who are in need and provides services to low-income customers in the Milwaukee area who have had and continue to have difficulty managing household energy costs. This program, administered through Milwaukee County's Management Services Division, was able to assist those customers through case management, thereby helping applicants to obtain aid and maintain their eligibility for further assistance.

The program enables low-income customers to focus on values of affordability, reduction of arrears, energy conservation and financial management.

In 2013-14, even though nearly 25,000 Milwaukee County households received the crisis assistance that is available to low-income customers, this number is only a portion of the households eligible to receive assistance. Energy Assistance - Federal funds, distributed through the State Department of Administration, are made available for low-income customers based on their level of energy use and their income. A combination of higher energy costs and energy use will only contribute to greater need. Increases in the number of families living in poverty will also affect the ability of families to afford energy costs and maintain a consistent payment plan. Any increases in cost of living are certain to have a negative impact on all energy consumers—especially those households relying on low- or fixed-incomes.

More specifically, the target population to be served through the Energy Assistance Outreach Program is Milwaukee County residents who are having challenges maintaining their utility service throughout the year or have experienced an energy crisis within the last 12-18 months. Target populations include the elderly, disabled, non-English speaking households, those with young children, low- and fixed-income households and the working poor residents of Milwaukee County.

To respond to the needs of Milwaukee County's low-income households in need of Crisis Assistance, Community Advocates Energy Assistance Program Utilities Advocates and Enrollment Specialists will provide services that include but are not limited to the following:

- Respond to requests for crisis assistance within 48 hours of receiving the request
- Respond within 18 hours of receiving a request if a situation is life threatening
- Verify household eligibility
- Verify that an Energy Assistance application for the household has been completed
- Provide emergency and pro-active crisis services to assist clients with home energy costs during the heating season.
- Provide pro-active services year-round
- Provide Case Management services
- Facilitate client enrollment in Energy Management workshops
- Provide links to the Low-Income Pilot program and other supportive services.
- Cooperate with the Energy Strategic Planning Committee, CA to develop a "Crisis Plan" to guide in managing funds and distributing benefits and services

Emergency Furnace Services

Community Advocates Energy Assistance Staff will process all requests for WHEAP emergency furnace replacement or repair. Staff is trained to recognize the immediate threat to the health, and even the lives, of those experiencing no-heat situations because of furnace failure. From January 1-February 28, 2014, Community Advocates received furnace service requests from 41 households. Staff is aware of the discretionary nature of this benefit and will use their experience and exercise professionalism when processing requests from eligible clients.

Staff will be responsible for

- Determination of household eligibility
- Determination if services will be provided
- Contacting the local weatherization agency to provide actual repair or replacement services
- Collecting and filing final documents
- Processing invoices

Fraud

Community Advocates Energy Assistance staff will periodically review applications and enrollment data for suspected incidents of fraud. If found, records and supporting data will be provided to CA's Division Director for determination and any suspected cases will be presented to Milwaukee County for follow-through with further action. CA has built-in reviews to prevent fraudulent enrollment and anticipates no cases (or very few) will necessitate such action. Refer to Fraud Hotline info page 7-3 RFP

Fair Hearings

If the client believes his/her application has been incorrectly denied or his/her payment is incorrect, the client may request a fair hearing. Community Advocates will attempt a resolution of fair hearing complaints prior to a fair hearing occurring. In the event that resolution does not occur, the agency will prepare for and attend the fair hearing as notified by the Wisconsin Department of Administration, Division of Hearing and Appeals or the Milwaukee County Department of Health and Human Services, Management Services Division.

QUALITY ASSURANCE AND OUTCOMES

Quality Assurance Compliance

Community Advocates will conduct internal Quality Assurance review of 10% of all Energy Assistance and furnace program referrals to ensure compliance with WHEAP regulations. Additionally, Community Advocates Energy Assistance Program will cooperate and expedite all monitoring and review of program services to assure Quality Assurance compliance. The Division Director will submit all evaluation reports complete and on time. Participant/client rights, non-discrimination policies and other pertinent State and Federal documents will be posted and displayed as required. On-site program monitors and evaluators will be given prompt convenient access to requested samples of client interviews, survey and questionnaires, case files and any other required documentation. Additionally, CA will provide access to all records covering the agency's organization and management structure, fiscal accountability and verification of service provision.

Current CA Energy Assistance Program Indicators

- Community Advocates completed 16,780 energy assistance applications for the 2013-2014 energy season.
- Community reduced appointment wait times to less than 30 minutes
- Community Advocates continues to provide a large portion of the outreach activities for Milwaukee County:
 - 1611 or 82% of all Alternative Site Applications
 - 203 or 83% of all Home Visits
 - 4200 or 93% of all mail/phone applications
 - In total CA completed 91% of all outreach for Milwaukee County

Required Outcomes

Outcomes

The Expected Outcomes listed in the RFP are as follows:

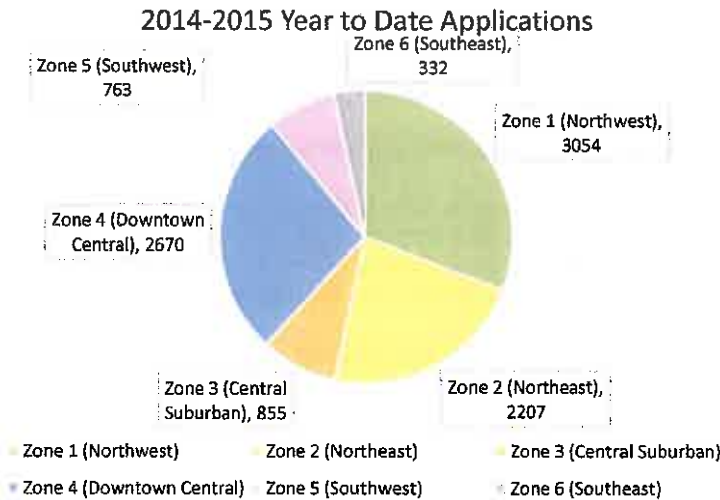
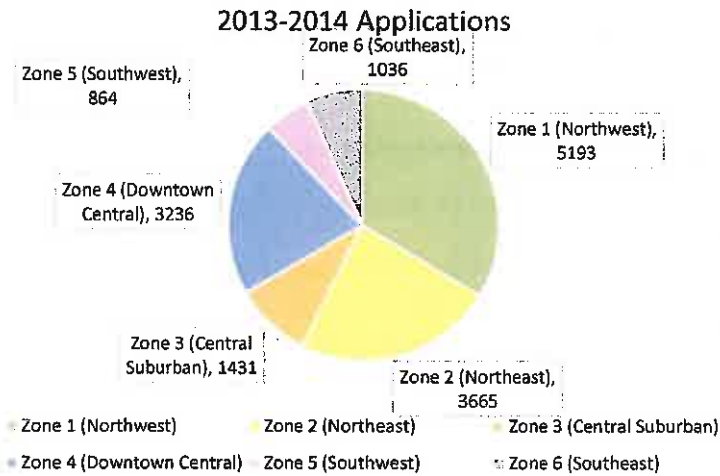
- 100% of all potentially eligible clients have had the opportunity to apply for energy assistance.
- 100% of crisis assistance applicants have been scheduled for an energy training/workshop, in accordance with policy outlined in the Crisis Plan.
- 100% of requests for emergency assistance are responded to within 48 hrs. of receipt.
- 100% of requests made in a life-threatening situation are responded to within 18 hrs. of receipt.
- 100% of cases on the Fixed Income list have had calls for phone applications attempted by the start of the energy season.
- 100% of the senior center/housing sites have been visited and/or scheduled for intake **prior** to the start of the energy season.

Each of the Outcomes above is included in the program Logic Model and is numbered to correspond to the RFP list. All Inputs, Activities, Outputs, Indicators and Projected

Achievements address all required program components. Community Advocates has identified *additional outcomes that will contribute to successful program operation* and these, too, are included in the Logic Model supporting the major program components identified in the RFP. [Please reference the Logic Model on page 111.]

Enrollment Statistics by Zone

The following charts present the number of enrollments Community Advocates Energy Assistance Staff completed in 2013-2014 and current 2014-2015 enrollment numbers. Enrollments are broken out by each of the six service zones as defined by Milwaukee County.



The table following describes Community Advocates' ability to provide similar programs, and the agency's experience in serving the targeted populations. All existing agency programs utilize similarities in service delivery.

Program Name	Funding Cycle	Funder	Program Volume	Target Population	Dollar Amount	Service Mix
Emergency Assistance	March 2009-10	State of Wisconsin	100 walk-ins daily	Low-income homeless	\$725,000	Assessment/Direct Aid/Case Management
Rapid Rehousing	July 2009-2012	City of Milwaukee	10-20 referral participants daily	Low-income homeless	\$1,900,000	Assessment/Direct Aid/Case Management
Mediation	July 2009-2012	City of Milwaukee	50-60 walk-ins daily	At risk for homelessness	\$1,070,000	Assessment/Direct Aid/Case Management
Energy Assistance	October 2010 – September 2011	Milwaukee County	78 applications daily	Low-income homeless	\$432,000	Assessment/Direct Aid/Case Management
HPRP – West Allis	September 2009 - 2012	City of West Allis	30 households daily	Low-income homeless and At risk for homelessness	\$572,000	Assessment/Direct Aid/Case Management

Each program listed above meets or exceeds its expected client service level and/or projections. These programs were selected not only based on similarities of delivery, but also to indicate CA's ability to professionally administer large dollar contracts. CA administers dozens of smaller contracts for programs that serve similar target populations and include similar service mix.

Agency-wide, Community Advocates now submits approximately 30 proposals for refunding renewal each year. Some are on competitive multi-year cycles; some must be renewed for funding every year. Within the mix of these programs, Community Advocates has been offering several for more than 30 years, while others, added as new programs over the years, have become ongoing hallmarks of the agency's services. For the last five years, Community Advocates rate for available refunding has been 100%, which supports CA's solid reputation for providing successful program management, fiscally responsible administration and client-centered service.

EXPERIENCE ASSESSMENT FOR NEW PROPOSER AGENCY

ITEM #29d

N/A

Community Advocates, Inc. has current contracts with Milwaukee County.



EXPERIENCE ASSESSMENT FOR NEW PROPOSER AGENCY

ITEM #29d

N/A

Community Advocates, Inc. has current contracts with Milwaukee County.



Program Evaluation: Agencies currently under contract to the DHHS in 2014 must include a copy of the most recent annual or semi-annual program evaluation report for the program currently provided, or, if several programs are being provided, for the program that is the most similar to the service being applied for in this proposal.

Program Evaluation 2013-2014

- Community Advocates completed 16,780 energy assistance applications for the 2013-2014 energy season.
- Community reduced appointment wait times to less than 30 minutes
- Community Advocates continues to provide a large portion of the outreach activities for Milwaukee County:
 - 1611 or 82% of all Alternative Site Applications
 - 203 or 83% of all Home Visits
 - 4200 or 93% of all mail/phone applications
 - In total CA completed 91% of all outreach for Milwaukee County

2015 PROVIDER SERVICE SITE INFORMATION

ITEM #30

Provide a separate sheet for each site location where services are provided.

Agency Name: Community Advocates, Inc.	Site Name: Zone 4 Downtown Central
Site Address: 728 N. James Lovell Street	City/State/Zip: Milwaukee, WI 53233
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Basic Needs Division: Housing, Utilities, and Disabilities Services

Milwaukee Women's Center Division: Addiction Day Treatment for Women

Behavioral Health Division: Permanent Supportive Housing Case Management

Public Policy Institute: Poverty Reduction Strategies & Advocacy

Total number of unduplicated consumers you are presently able to serve at any one time:
4,500 Daily

Total number of unduplicated consumers you are currently serving: **6,000 Daily**

Please check if your agency provides the following at this site:

Programs for men Programs for women Programs for men & women

Services for pregnant women

Services for families with children _____ Childcare provided

Services for Persons Involved in the Criminal Justice System

Services for the Developmentally Disabled

Services for the Physically Disabled

Services for persons with co-occurring mental health and substance use disorders

Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

During Peak Energy Season

During Non-Peak Energy Season

7 a.m. – 7 p.m. Monday

11 a.m. – 5 p.m. Monday

7 a.m. – 7 p.m. Tuesday

9 a.m. – 5 p.m. Tuesday

7 a.m. – 7 p.m. Wednesday

9 a.m. – 5 p.m. Wednesday

7 a.m. – 7 p.m. Thursday

9 a.m. – 5 p.m. Thursday

7 a.m. – 7 p.m. Friday

9 a.m. – 4 p.m. Friday

9 a.m. – 1 p.m. Saturday

N/A Saturday

N/A Sunday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: **Maudwella Kirkendoll (414) 699.6820**

Agency owns this Service Site

_____ Agency leases this Service Site:

Expiration date of Lease: _____

(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 1 Northwest
Site Address: 4906 W. Fond du Lac Ave.	City/State/Zip: Milwaukee, WI 53216
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudweilak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children _____ Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

<u>During Peak Energy Season</u>	<u>During Non-Peak Energy Season</u>
<u>7 a.m. – 7 p.m.</u> Monday	<u>11 a.m. – 5 p.m.</u> Monday
<u>7 a.m. – 7 p.m.</u> Tuesday	<u>9 a.m. – 5 p.m.</u> Tuesday
<u>7 a.m. – 7 p.m.</u> Wednesday	<u>9 a.m. – 5 p.m.</u> Wednesday
<u>7 a.m. – 7 p.m.</u> Thursday	<u>9 a.m. – 5 p.m.</u> Thursday
<u>7 a.m. – 7 p.m.</u> Friday	<u>9 a.m. – 4 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: Maudwella Kirkendoll (414) 699.6820

- Agency owns this Service Site
- Agency leases this Service Site:

Expiration date of Lease: _____
 (lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 4 Downtown Central
Site Address: Robles Center 906 W Historic Mitchell	City/State/Zip: Milwaukee, 53204
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time:
N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

<u>During Peak Energy Season</u>	<u>During Non-Peak Energy Season</u>
<u>9 a.m. – 5 p.m.</u> Monday	<u>9 a.m. – 1 p.m.</u> Monday
<u>9 a.m. – 5 p.m.</u> Tuesday	<u>9 a.m. – 1 p.m.</u> Tuesday
<u>9 a.m. – 5 p.m.</u> Wednesday	<u>9 a.m. – 1 p.m.</u> Wednesday
<u>9 a.m. – 5 p.m.</u> Thursday	<u>9 a.m. – 1 p.m.</u> Thursday
<u>9 a.m. – 5 p.m.</u> Friday	<u>9 a.m. – 1 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: Maudwella Kirkendoll (414) 699.6820

- Agency owns this Service Site
- Agency leases this Service Site:

Expiration date of Lease: Please see Hunger Task Force MOU
(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 3 – Satellite Site
Site Address: West Allis City Hall 7525 W Greenfield	City/State/Zip: West Allis, WI 53214
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: **N/A**

Total number of unduplicated consumers you are currently serving: **N/A**

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

During Peak Energy Season	During Non-Peak Energy Season
<u>9 a.m. – 5 p.m.</u> Monday	<u>9 a.m. – 1 p.m.</u> Monday
<u>9 a.m. – 5 p.m.</u> Tuesday	<u>N/A</u> Tuesday
<u>9 a.m. – 5 p.m.</u> Wednesday	<u>9 a.m. – 1 p.m.</u> Wednesday
<u>9 a.m. – 5 p.m.</u> Thursday	<u>N/A</u> Thursday
<u>9 a.m. – 5 p.m.</u> Friday	<u>9 a.m. – 1 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

Emergency Contact Available 24 Hours
 Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site
 Agency leases this Service Site:

Expiration date of Lease: Please see City of West Allis MOU
(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site - Woodlands
Site Address: 8865 N. Swan Road	City/State/Zip: Milwaukee, WI 53224
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children _____ Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

____ Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see Woodlands MOU

(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site HACM
Site Address: 809 N. Broadway	City/State/Zip: Milwaukee, WI 53202
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time:
N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see HACM MOU

(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site Jomela Properties
Site Address: 5601 W. North Avenue	City/State/Zip: Milwaukee, WI 53208
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children _____ Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see Jomela Properties MOU
(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site DHHS Housing Division
Site Address: 600 W. Walnut Street	City/State/Zip: Milwaukee, WI 53208
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children _____ Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

- TBD per MOU Monday
- TBD per MOU Tuesday
- TBD per MOU Wednesday
- TBD per MOU Thursday
- TBD per MOU Friday
- N/A Saturday
- N/A Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: Maudwella Kirkendoll (414) 699.6820

- _____ Agency owns this Service Site
- Agency leases this Service Site:

Expiration date of Lease: Please see DHHS Housing Division MOU
(lease must extend through the end of the contract year, at minimum)

Item 30 Service Site Certification:

I certify that the **PROVIDER SERVICE SITE INFORMATION** is correct as of the date of proposal submission.

Signed, Andrea Mallmann Elliott

Name (print) Andrea Mallmann- Elliott

Title Chief Executive Officer

Phone (414) 270-2941

Email andie@communityadvocates.net

RE: Energy Assistance Proposal

Andi Elliott <AndiE@communityadvocates.net>

Tue 3/31/2015 2:19 PM

Inbox

To: Gallegos, Diane <Diane.Gallegos@milwaukeecountywi.gov>;

cc: Maudwella Kirkendoll <MaudwellaK@communityadvocates.net>;

1 attachment (869 KB)

Item 20 Additional Disclosures.pdf;

Good Afternoon Diane,

Please find attached the required documentation for Item 20 – Additional Disclosures along with the original form. My apologies for the oversight in our initial submission and thank you for allowing us to correct the unintentional omission. Please let me know if there is anything else you need at this time.

Best regards,

Andi

Andi Elliott

Community Advocates, Inc.

414.270.2941, 414.270.2971 Fax, 414.517.6718 Cell

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From: Gallegos, Diane [mailto:Diane.Gallegos@milwaukeecountywi.gov]

Sent: Tuesday, March 31, 2015 12:52 PM

To: Andi Elliott

Subject: Energy Assistance Proposal

Andi,

We have received your proposal for the Energy Assistance (WHEAP) RFP for Milwaukee County.

<https://outlook.office365.com/owa/>

4/1/2015

After doing an initial review, we have found an issue with the proposal and are allowing you an opportunity to revise this item in your proposal.

Part 1, Item 20 Additional Disclosures

On page 22 of your proposal, you completed and signed the additional disclosures form. Items 1, 3, and 4 were checked yes. These items require a detailed explanation be attached to the form. We could not find documentation of these items within the proposal.

We would like to give you the opportunity to submit

- a. a revised form
- b. a reference to where these items were submitted in the proposal or
- c. a copy of the current form and the required documentation.

You may submit these **documents to me electronically at this email address by noon Friday, April 3, 2015.**

thanks,

Diane Gallegos

Contract Services Coordinator
Wisconsin Home Energy Assistance Program
Milwaukee County
Department of Health and Human Service
1220 W Vliet Street Room 300-039
Milwaukee, WI 53205

Diane.Gallegos@MilwaukeeCountyWI.gov
414-289-5744

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ADDITIONAL DISCLOSURES

ITEM # 20

1. Has your organization or any representative, owner, partner or officer ever failed to perform work awarded or had a contract terminated for failure to perform or for providing unsatisfactory service?

X Yes No If yes, on a separate page please provide a detailed explanation.

2. Within the past five (5) years, has your organization or any representative, owner, partner or officer (collectively "your Company") ever been a party to any court or administrative proceedings or disciplinary action, where the violation of any local, state or federal statute, ordinance, rules, regulation, or serious violation of company work rules by your Company was alleged?

Yes X No If yes, on a separate page, please provide a detailed explanation outlining the following:

- Date of citation or violation
- Description of violation
- Parties involved
- Current status of citation

3. Within the past 5 years has your organization had any reported findings on an annual independent audit?

X Yes No If yes, on a separate page please provide a detailed explanation.

4. Within the past 5 years, has your organization been required to submit a corrective action plan by virtue of review or audit by independent auditor, or any governmental agency or purchaser of services?

X Yes No If yes, on a separate page please provide a detailed explanation including if the corrective action has been accepted by the purchasing agency and completely implemented? If not, please explain remaining action required by purchasing agency.

5. Have you, any principals, owners, partners, shareholders, directors, members or officers of your business entity ever been convicted of, or pleaded guilty, or no contest to, a felony, serious or gross misdemeanor, or any crime or municipal violation, involving dishonesty, assault, sexual misconduct or abuse, or abuse of controlled substances or alcohol, or are charges pending against you or any of the above persons for any such crimes by information, indictment or otherwise?

Yes X No If yes, on a separate page, please provide a detailed explanation.

Authorized Signature: Andrea Mallmann-Elliott Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

22| Community Advocates, Inc.

RE: 1. *Has your organization or any representative, owner, partner or officer ever failed to perform work awarded or had a contract terminated for failure to perform or for providing unsatisfactory service?*

Milwaukee County DHHS Behavioral Health Division terminated Community Advocates' Crisis Resource Center contract for non-compliance and adherence to DHS 24 requirements and failure to comply with the corrective action plan submitted to BHD.

RE: 3. *Within the past 5 years has your organization had any reported findings on an annual independent audit?*

The following condition was identified in the 2011 Community Advocates, Inc. Consolidated Financial Statements.

Section II: Financial Statement Findings
SIGNIFICANT ADJUSTMENTS (2011-01)

Condition:

Wipfli LLP proposed a number of adjusting journal entries as a result of the year-end audit, which we deem to be significant to the financial statements. It was noted that several significant accounts were not being reconciled or monitored on a regular basis. The lack of effective control over and accountability for funds, property, and other assets indicates a significant deficiency in internal controls.

Effect:

A lack of proper internal controls over critical accounting areas could result in significantly misstated financial statements. As a result of this condition, there is a significant deficiency in internal control.

Recommendation:

Significant account balances should be reconciled and monitored regularly during the year and at year end.

Management's Response:

On October 1, 2011 Community Advocates moved its accounting function from an outside vendor and began recording accounting activity using our own general ledger system and staff. This transition was more difficult than we expected and caused some issues relating to timeliness of reconciliation of accounts.

Once we recognized that all significant accounts are now being reconciled in a timely manner, an outside accounting firm was hired to monitor the reconciliation process. Monthly reconciliations of significant balance sheet accounts are now being completed and reviewed on a time basis.

RE: 4. *Within the past 5 years, has your organization been required to submit a corrective action plan by virtue of review or audit by independent auditor, or any governmental agency or purchaser of services?*

Community Advocates was required to submit a corrective action plan to Milwaukee County DHHS Behavioral Health Division for the Crisis Resource Center (CRC). The CRC contract was terminated failure to comply with the corrective action plan submitted to BHD.

22a] Community Advocates, Inc.

Energy Assistance Proposal

Gallegos, Diane

Tue 3/31/2015 12:52 PM

To: Andi Elliott <AndiE@communityadvocates.net>;

Andi,

We have received your proposal for the Energy Assistance (WHEAP) RFP for Milwaukee County.

After doing an initial review, we have found an issue with the proposal and are allowing you an opportunity to revise this item in your proposal.

Part 1, Item 20 Additional Disclosures

On page 22 of your proposal, you completed and signed the additional disclosures form. Items 1, 3, and 4 were checked yes. These items require a detailed explanation be attached to the form. We could not find documentation of these items within the proposal.

We would like to give you the opportunity to submit

- a. a revised form
- b. a reference to where these items were submitted in the proposal or
- c. a copy of the current form and the required documentation.

You may submit these **documents to me electronically at this email address by noon Friday, April 3, 2015.**

thanks,

Diane Gallegos

Contract Services Coordinator
Wisconsin Home Energy Assistance Program
Milwaukee County
Department of Health and Human Service
1220 W Vliet Street Room 300-039
Milwaukee, WI 53205

Diane.Gallegos@MilwaukeeCountyWI.gov
414-289-5744

<https://outlook.office365.com/owa/>

4/1/2015

Attachment A

PAMELA EDWARDS KLEIN

2312 E. Kensington Blvd.
Shorewood, WI 53211
(414) 962-1449
peklein@execpc.com

SUMMARY OF QUALIFICATIONS

SENIOR EXECUTIVE with over 20 years of progressive responsibility in the senior housing industry including building organizational and stakeholder value. Leadership role in creating infrastructure for growth, generating funding to achieve development targets, developing strategy for industry positioning and recruiting key personnel to sustain dynamic growth. Demonstrated performance in:

- | | | |
|--------------------------|---------------------|----------------------------|
| New Business Development | Market Segmentation | Team/Leadership Building |
| Change/Growth Management | M & A Integration | Organizational Development |
| Strategic Planning | Customer Service | Product Innovation |

PROFESSIONAL EXPERIENCE

FRESH COAST PARTNERS, LLC, Milwaukee , WI **2008- Present**
Owner/Principal

A privately held, for profit management and consulting company with a focus on the senior housing industry.
Provider with expertise in development and management of affordable senior housing, market-rate assisted living, dementia care facilities and independent living properties. Capabilities include all aspects of the management of services and property physical plant with capacity in accounting, budgeting, marketing/advertising, facility licensing and regulation, property maintenance and deliver of resident services. Experienced in start-up projects and turn-around of troubled properties. Offer an employee-centered culture resulting in superior service delivery to seniors and their families. Operator of assisted living facilities located in Wisconsin.

THE DAMONE GROUP, Troy, MI **2002 to 2008**
Director, Affordable Housing

A privately held real estate development and construction management company with a focus on commercial office buildings, self-storage facilities, senior housing and assisted living facilities.
Responsibilities include business development, financing and project development. Focus on senior housing with special emphasis on creating service solutions to allow aging in place. Financed over \$50 million in new construction affordable housing. Experienced in the QAP process in Michigan, Indiana and Wisconsin. Managed all phases of the development process including market identification, preliminary market research, site identification and procurement, securing tax abatement, site rezoning, site plan approval, tax credit application and obtaining additional required financing.

TASK FORCE ON VIOLENCE, Milwaukee, MI **2000 to 2002**
Executive Director

A non-profit agency with a mission a mission to help reduce violence within families by helping victims obtain restraining orders and related legal services, teaching batterers how to stop their violent behavior and by promoting a coordinated community response to family violence with a staff of 18 and an annual budget of \$1.3 million.
Charged with developing a new strategic direction for this 26-year-old organization. Responsible for administrative and financial management of the agency.

ALTERRA HEALTHCARE CORP. (now Brookdale Senior Living), Milwaukee, WI **1992 to 2000**

A formerly \$2 million private business that, over an 8 year period, grew to become the largest publicly-owned assisted living company in the nation, with 471 elder care residences in 28 states and anticipated revenues of over \$400 million in 2000.

Senior Vice President, Customer Services **2000**

Established a service center for customer and employee quality and satisfaction with an operational budget of over \$1 million. Managed the implementation of reporting systems to identify trends and develop programs to address critical needs.

- Identified critical success factors to overall customer satisfaction. Developed and rolled out a training program that significantly reduced customer complaints in regions where it was implemented.

PAMELA EDWARDS KLEIN

Senior Vice President, Corporate Development 1998 to 2000

Accountable for the development and construction of \$450 million in assisted living residences in 20 states. Responsible for market research, architectural and interior design, and development and construction.

- Restructured Corporate Development Department to address inefficiencies, increase control over development and enhance quality in the construction process. Decreased overhead by \$400,000.
- Managed group that evaluated markets and recommended new products. Targeted growth goals were achieved and over 200 new residences were opened.
- Identified unmet customer needs and created plans for enhancing existing building types and developing new models to meet changing market demands.
- Led planning team that examined growth strategies in response to changing market dynamics. Identified opportunities to achieve market leadership and cluster residences to create greater operating efficiencies.

Vice President, Strategic Initiatives 1998

Responsible for strategic planning and facilitating the integration of acquisitions into the existing company portfolio.

- Led successful integration process between Alternative Living Services and Sterling House (with \$40 million and \$16 million in revenues respectively) allowing both companies to maintain aggressive growth strategies.

Vice President, Employee Services and Quality Management 1996 to 1997

Managed human resources, training, communications and quality management serving 5,000 employees.

- Aligned human resources function with company mission and strategy by establishing employee services group to foster an employee centered culture.
- Key player in the creation of a mission driven culture that allowed Alterra to recruit and retain a strong senior management team and successfully address retention of field staff.

Vice President, Corporate Development 1995 to 1996

Responsible for business development, market research, communications and corporate strategic planning.

- Developed branding concept to more efficiently market residences and enhance company name recognition.

Director, Market Development 1992 to 1995

Responsible for market research and business development.

- Identified unmet market niches and developed new product types that doubled market share.
- Developed national identity for Alterra through active involvement in the national trade association. Personally recognized as an industry expert and leader and influential in defining industry direction.

EDUCATION

M.B.A., University of Wisconsin-Milwaukee, Milwaukee, WI
M.Ed., Counseling, University of Virginia, Charlottesville, VA
B.S., Psychology, James Madison University, Harrisonburg, VA

AFFILIATIONS

Wisconsin Assisted Living Association (WALA) – member
Community Advocates – board President
Racine Elder Services Network – member
Kenosha Aging Consortium - member

SHEREE DALLAS BRANCH

5019 N. Sheffield Ave.
Whitefish Bay, WI 53217
(414) 520-2613 (cell)
sheree7@sbcglobal.net

SUMMARY OF QUALIFICATIONS

Senior management professional with exceptional interpersonal and communication skills and extensive background in the following competencies:

- Expert in public relations, government relations, media relations and crisis communications
- Centralized focus: marketing and project management
- Effective communicator and corporate spokesperson
- Proven experience in problem-solving, managing and expediting projects and programs
- Direct and manage state-wide programs

RELEVANT PROFESSIONAL EXPERIENCE

Director of Strategy, ABRAZO Marketing and Communications 2013-Present

- Create and execute public relations, marketing and public information strategies
- Expertise in marrying traditional and social media platforms
- Experience developing a diverse range of communication solutions – from brand launches to business to business marketing
- Planning and execution of special events, market research and web-site development

Project Management/Public Relations Consultant 2011-2013

- Create and execute marketing and public relations strategies
- Facilitate Community Engagement and Project Management
- Leadership Development and Training

State of Wisconsin 2006-2011

Administrator-Division of Administrative Services, Department of Administration 2009-2011

- Responsible for 4 key areas: Human Resources, State-Wide Employee Training, Finance and Emergency Management
- Official Division Spokesperson
- Operating Budget of \$5.7 million and 48 staff

Administrator-Division of Energy Services, Department of Administration 2007-2009

- Managed state energy services programs
- Official Division Spokesperson
- Managed 4 key areas: Finance, Program & Planning, Training and Development, and Compliance
- Responsible for all communications strategy, state-wide marketing and strategic-planning
- Operating budget was approximately \$150 million and division staff of 32

Deputy Secretary, Department of Tourism

2006 - 2007

- Chief Operating Officer for state agency
- Key Department liaison to Governor Jim Doyle and staff
- Official Agency Spokesperson
- Managed department's day to day operations and \$15 million budget, including marketing budget of \$9 million
- Lead external agencies to deliver department marketing goals
- Provided organizational and strategic leadership to more than 40 marketing and communications professionals
- Provided leadership and guidance to Wisconsin's tourism industry to ensure that tourism is a top contributor to the state's economy and quality of life.

Communications and Public Affairs Manager, Master Lock Company

1999 - 2006

- Corporate liaison for president and senior executive staff
- Official corporate spokesperson and public relations counsel
- Develop key messages for executive and management team (media-relations)
- Manage and direct all local and national public relations and media functions related to corporate branding initiatives
- Develop, implement and execute communication strategic plan, media statements and corporate correspondence
- Align with business groups to develop and execute messages
- Manage and direct all internal corporate communications functions
- Create successful cause marketing initiatives related to global objectives
- Manage million dollar community & public relations budget
- Plan and maintain department budget, managing product and monetary donations
- Manage local and national consultants and public relations firm representatives
- Responsible for increased corporate visibility and social responsibility

Freelance Producer / Reporter, Channel 10/36

1999 - 2008

- Write and determine content and produce features for weekly television magazine show

Project Manager / Consultant, Second Harvest Food Bank

1997 - 2000

- Negotiated and administered contracts for State of Wisconsin and Milwaukee County Social Services
- Increased program revenue by 140%
- Responsible for all communications, sales and marketing programs related to special programs

Associate Producer / Field Reporter, WTMJ - 4

1995 - 1997

- Gathered, wrote and produced morning news show - "Day Break"
- Produced and wrote news stories focusing on local human interest - "Positively Milwaukee"

EDUCATION *Bachelor of Arts Degree – Broadcast Communications*
University of Wisconsin- Milwaukee

AWARDS *Corporate Trailblazer Award*
Milwaukee Times

Beyond The Paycheck
The Business Journal

Board Appointments

Ko-Thi Dance Company
Board Member

Community Advocates
Board Member

Donald Driver Foundation
Former Board Member

Cultural Alliance
Former Board Member

**PROFESSIONAL
ORGANIZATIONS**

Links, Incorporated
Wisconsin Media Association
Black Public Relations Society-Milwaukee Chapter

References
Available Upon Request

Sandra Samse – Brief Bio

Sandy lives in Cedarburg and has been married to Mark for 12 years. They have three children—Jack 9, and Abby and Olivia who are 5. She is a Tax Director in the Global Employer Services area of Deloitte and has practiced in this area for over 16 years.

Sandy has been active in the community, serving on the Board of Directors as Treasurer of the Milwaukee Women's Center for over five years. She also volunteers much of her time at her children's schools and Dr. Martin Luther King elementary School in Milwaukee. Her interests include spending time with her family, supporting her community, and travelling.

BBA – Accounting from UW Whitewater

CPA

Tax Director in largest accounting firm in Wisconsin

Co-lead a practice of 35 people

18 years of experience

Church Treasurer for 3 years

Church Business Committee member for 6 years

TIMOTHY C. CHAREK
3150 North 94th Street
Milwaukee, Wisconsin 53222
414-444-6610 (home), 414-526-5004 (cell)
5wicks@prodigy.net

PROFESSIONAL EXPERIENCE

Administrative Specialist/Association Support 9/2014 to present
At the National Association of Catholic Chaplains, provide administrative support to the Executive Director, the Board of Directors, Commissions, Committees and Panels of organization.

Director of Administrative Services 9/2012 to 8/2014
At Christ King Parish, Wauwatosa, responsible for financial management, financial controls, human resources, buildings and grounds including preparation and monitoring of annual budget, personnel immediate supervision of all administrative, secretarial and maintenance staff, liaison to Archdiocese on administrative matters; facilitation of finance and buildings & grounds committees; preparation of parish reports to councils and committees; assisted in the transition of outgoing pastor, a temporary priest administrator and regular priest administrator.

Director of Administrative Services 7/2009 to 9/2012
Three clustered parishes: St. Mary, St. Peter of Alcantara (Port Washington, Wisconsin) and Immaculate Conception (Saukville, Wisconsin)

Responsible for financial management, financial controls, human resources, buildings and grounds of the three parishes, including preparation and monitoring of annual budget, personnel immediate supervision of all administrative, secretarial and maintenance staff, liaison to Archdiocese on administrative matters; facilitation of finance and buildings & grounds committees; preparation of parish reports to councils and committees; leadership in the Archdiocese-sponsored parish clustering process.

Business Manager 9/2007 to 7/2009
St. Bernadette's Parish, Milwaukee, Wisconsin
Responsible for financial management of the parish/school, \$1.5 million budget, \$5 million in assets, including development and monitoring of annual budget as well as personnel matters.

**SAINT FRANCIS SEMINARY,
ARCHDIOCESE OF MILWAUKEE:** Milwaukee, Wisconsin 1984 to 2007

Director, Certificate Division (1990 to 2007)
Responsible for directing the Lay Ministry Formation Program, including specializations in administrative services for parishes, pastoral services for parishes, and Christian formation leadership for parishes; the Permanent Diaconate Formation Program; both with the Spanish-speaking and African-American components. Responsible for the development and monitoring of budget, supervision of staff of 8 and well as adjunct faculty of 50, and program volunteers (75).

Director, Financial Aid (1997 to 2007)

- Managed seminary's financial aid system
- Chair of Grant and Scholarship Board
- Identified and secured scholarship money for students

Co-Director, Certificate Division 1988 to 1990
Associate Director, Office for Permanent Diaconate 1984 to 1988

WELFARE ADVOCACY CENTER, INC.: Milwaukee, Wisconsin 1978 to 1984
Executive Director (1979 to 1984)
Manager (1978 to 1979)

TIMOTHY C. CHAREK - Page Two

EDUCATION

**GRADUATE THEOLOGICAL FOUNDATION: Donaldson, Indiana
Masters in Business Administration**

**SAINT FRANCIS SEMINARY: St. Francis, Wisconsin
Masters of Divinity**

**SAINT FRANCIS DE SALES COLLEGE: St. Francis, Milwaukee
Bachelor of Arts, Philosophy and Theology**

ADDITIONAL TRAINING:

**Fund-raising & Fund Development, Board Development, Organizational Development,
Personnel Management, Social Services Management, Policy Development,
Fiscal & Budgetary Management, Volunteer Management, Community Organizing,
Leadership Development, Diversity and Multiculturalism, Department of Education – Financial Aid**

AFFILIATIONS

**Current Member, Community Advocates, Inc.
Positions held include President, Board of Directors, and Executive Committee Chair
Member of Strategic Planning Committee**

**Current Member, Program Advisory Committee for SSSF Music Ministry
St. Joseph's Center – Milwaukee, Wisconsin**

PREVIOUS AFFILIATIONS

Member, Business Administrators of the Archdiocese of Milwaukee group

Member, Standards Committee, National Association of Lay Ministry

Member, Christ King Pastoral Council, Vice-Chair

Member, ProAdvisor program – Quickbooks

Presenter, Certificate Formation Program, Clare Center, Cardinal Stritch University

Board Member, Homestead Board, City of Milwaukee – Mayoral Appointment

Board Member, Emergency Shelter, Inc.

**Co-founder & Board Member, The Adult Services Coalition - Executive Committee
and Outreach Committee Chair**

Board Member, Gifts from the Heart, Milwaukee - Board of Directors and Finance Committee Chair

Member, United Way of Greater Milwaukee - Committee to Study Public/Private Funding

Member, Legal Action of Wisconsin, Chair of Program Committee

Anne L. De Leo

Anne L. De Leo is a retired attorney. During her working years she was employed by Legal Action of Wisconsin, a legal services organization. She focused her legal services practice on federal litigation to improve access to public assistance programs. She also served as Associate Director of Legal Action.

After leaving legal services, she spent four years working for newly elected congressman, Tom Barrett, as the director of his local office.

From 1997 until her retirement in 2014, she worked as an employee and a shareholder in a law firm, Nelson Irvings & Wessels, concentrating her practice on estate planning for elderly and disabled individuals primarily concerned with long-term care and Medical Assistance issues.

She lives in the Washington Heights neighborhood in the city of Milwaukee and is active in her neighborhood association.

Valerie J. Gabriel

EMPLOYMENT

Director, Council #10 UniServ, Wisconsin Education Association Council, 1990 – 2013

Associate Counsel, Wisconsin Education Association Council, 1988 – 1990

Attorney-at-Law, small private general practice, 1986 – 1990

Teacher, Waukesha Public Schools, 1970 – 1983

Executive Secretary, Education Association of Waukesha, 1981 – 1983

BOARDS OF DIRECTORS

Community Advocates, 1986 – present; primarily as personnel committee chair, prior service as board vice-president

Sherman Park Community Association, @1985 – 1990; fundraising, service as board vice-president

TriWauk UniServ Council, @1976 – 1983; service as vice-president, president

OTHER SIGNIFICANT VOLUNTEER OR INTERNSHIP POSITIONS

Legal Aid Society of Milwaukee, student internship in the Municipal Defense Project, academic year 1985-1986

Equal Rights Division of (then) Wisconsin Department of Industry, Labor and Human Relations, student internship, fall semester 1985

North Carolina Occupational Safety and Health, internship through National Lawyers Guild, summer 1985

Congressman Gerald Kleczka's Milwaukee Office, volunteer assistant to constituent liaison officer of immigration affairs, spring semester 1985

Task Force for Battered Women in Milwaukee County District Attorney's Office, volunteer advocate, academic year 1984-1985

Wisconsin Education Association Council Legislative Committee, 1977 – 1981

Education Association of Waukesha, various positions including executive committee and legislative committee (chair), 1974 – 1983



EDUCATION

Juris Doctor, Marquette University Law School, 1986

Master of Arts, Cardinal Stritch College, Milwaukee, WI, 1975; additional 31 graduate credits post-MA, including teaching assignments in Scotland (1981) and Denmark (1978)

Bachelor of Arts, University of Wisconsin – Whitewater, 1970

Milwaukee Public Schools, Washington High School, 1966



Bryan B. House

Partner

bhouse@foley.com



Bryan B. House is a partner with Foley & Lardner LLP and a member of the firm's Securities Enforcement & Litigation and Government Enforcement, Compliance & White Collar Defense Practices. He is the chair of the Milwaukee Litigation Department. Mr. House's particular focus area is securities litigation, securities enforcement proceedings and whistleblower matters.

Mr. House's securities litigation experience includes representation of public companies, investment banks and their directors and officers in class action litigation under the Private Securities Litigation Reform Act, including a recent matter in which the firm's clients prevailed in a published opinion, *Fulton County Employees Ret. Sys. v. MGIC Investment Corp.*, 675 F.3d 1047 (7th 2010). Mr. House also has represented public companies and their directors and officers in class actions challenging merger transactions and proxy disclosures. He also has represented public and private companies, audit committees, special committees, officers and directors in connection with internal investigations regarding a variety of state and federal securities law matters, as well as litigation brought by whistleblowers.

Locations

P 414.297.5554
777 East Wisconsin Avenue
Milwaukee, WI 53202-5306

P 202.672.5323
Washington Harbour
3000 K Street, N.W.
Suite 600
Washington, D.C. 20007-5109

Practice Areas

False Claims Act & Whistleblower
Defense
Government Enforcement, Compliance &
White Collar Defense
Securities Enforcement & Litigation

Bryan's Social Media

LinkedIn
Profile

<http://www.foley.com/bryan-b-house/>

3/18/2015

Mr. House has represented a variety of clients, including public companies, broker-dealers, underwriters, issuers, attorneys, auditors, and officers and directors, in enforcement matters before the SEC, the Department of Justice and self-regulators, including FINRA. These proceedings have included such diverse topics as accounting irregularities, audit failures, insider trading, market timing, options backdating, subprime failures and the Foreign Corrupt Practices Act.

Publications

Mr. House is a contributing author of the *Securities Enforcement: Counseling and Defense* treatise, published by Matthew Bender (last updated 2013). In 2013, his byline article, "Despite Confusion Regarding Key Whistleblower Statutes, Companies Must Be Prepared," was published for the Wisconsin Chapter of Association of Corporate Counsel.

Education

Mr. House graduated from Indiana University in 1990, with Phi Beta Kappa honors. He graduated from the University of Minnesota Law School, *cum laude*, in 1993.

Admissions

He is admitted to the bar in Wisconsin and the District of Columbia, as well as numerous federal district and appellate courts.

are On



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Bryan B. House
Foley & Lardner LLP – Partner

Locations

P 414.297.5554
777 East Wisconsin Avenue
Milwaukee, WI 53202-5306

P 202.672.5323
Washington Harbour 3000 K Street, N.W. Suite 600
Washington, D.C. 20007-5109

Practice Areas

False Claims Act & Whistleblower Defense
Government Enforcement, Compliance & White Collar Defense
Securities Enforcement & Litigation

Professor Stephen Hargarten, MD, MPH currently serves as chairman of the Department of Emergency Medicine at the Medical College of Wisconsin. Dr. Hargarten completed his Medical Degree at the Medical College of Wisconsin in 1975. He completed a Masters Degree in Public Health at The Johns Hopkins School of Public Health and Hygiene in 1984. Dr. Hargarten has been practicing emergency medicine in the Milwaukee community for over 30 years. He has been active in the field of injury control and prevention for 25 years. He is currently the director of the Firearm Injury Center at the Medical College of Wisconsin as well as the Injury Research Center at the Medical College. Dr. Hargarten co-authored the published text "Reducing Firearm Injury and Death: A Public Sourcebook on Guns." He has received multiple grant support from government agencies and foundations.

Betsy Hoylman

betsyhoylman@northwesternmutual.com | 414-665-5277

NORTHWESTERN MUTUAL, 2004-present

Director- Media & Public Relations

- Develop and direct national and regional earned media strategy
- Lead development and execution of integrated PR plans supporting company products and initiatives
- Ensure reputation management
- Serve as corporate spokesperson

Manager- Organizational Communication

- Managed team of communicators responsible for disseminating daily information via internal channels
- Ensured efficient support of print and electronic channels through process development
- Coordinated corporate messaging between employee, field and external audiences
- Developed crisis messaging for field and employee audiences

Executive Communication Consultant

- Advised CEO on communication matters for both internal and external audiences
- Wrote all materials issued on behalf of CEO, including speeches, executive summaries for board of trustees, letters to policyowners, annual report communication, community involvement initiatives

Manager- Media Services

- Managed creative services team delivering electronic communication solutions, including video and web

HOYLMEDIA LLC, Co-owner, 2001-2004

- Developed messaging and wrote marketing communication materials for corporate and nonprofit clients including videos, interactive CDs, web sites, and brochures
- Provided media training and advised on media strategies for corporate and nonprofit clients
- Wrote and coordinated information for sales presentations using PowerPoint
- Clients included: Miller Brewing, John Deere, Reinhart, FiServ, Gilda's Club

LANDAAS & COMPANY, Communications Manager and Investment Adviser, 1996-2001

- Created client communication materials, marketing communication
- Developed firm's first web site
- Created and led media response during reputation management crisis
- Spokesperson at marketing events for 300-500 people
- Held Series 7 license and Wisconsin insurance license, sold stocks, bonds, annuities, mutual funds

"DOLLAR SIGNS" ON PBS, Producer, writer, host/co-host, 1992-2000

- Team member that helped create financial news program at Channels 10/36 Milwaukee and broadcast around the country
- Researched financial market data, interviewed financial industry experts
- Booked guests, wrote copy and supervised editing of segments on deadline

WTMJ-TV, Anchor and reporter, 1984-1992

- Anchored weekend newscasts
- Reported local and national stories for Milwaukee NBC affiliate

Education

INDIANA UNIVERSITY, Bloomington, IN

Bachelor of Arts, (double major) Telecommunications (Radio/TV) and Speech Communications

Betsy Hoylman

betsyhoylman@northwesternmutual.com | 414-665-5277

NORTHWESTERN MUTUAL, 2004-present

Director- Media & Public Relations

- Develop and direct national and regional earned media strategy
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- Anchored weekend newscasts
- Reported local and national stories for Milwaukee NBC affiliate

Education

INDIANA UNIVERSITY, Bloomington, IN

Bachelor of Arts, (double major) Telecommunications (Radio/TV) and Speech Communications

Sharon Jordan

414-403-0297 • sjordan@wi.rr.com

Expert Community Relations advocate with the passion to drive community awareness for causes that fundamentally change people's lives. Uniquely talented with the ability to generate buzz and awareness within extremely limited budgets.

- Community outreach
- Project management
- Relationship building
- Budget management
- Coalition building
- Group facilitation
- Problem solving
- Negotiations
- Planning and organizing
- Requirements gathering
- Communication skills
- Time management

Experience

Direct Supply, Inc.

1997 - Present

Provider of equipment and furnishings, renovation and design, building management, procurement automation, and maintenance services to the Senior Living Industry.

Community Relations Manager

Lead Direct Supply's Community Involvement program aligning corporate citizenship initiatives to the organizations mission, principles, and values

- Created and Implemented Community Involvement Initiative Program
- Assisted in development of foundation's charitable giving program and provide day-to-day oversight
- Develop and implement strategic direction for all community involvement activities focused on senior citizens, youth and community
- Coordinate volunteer opportunities for 1,000 employees, totaling 4,000 hours annually
- Author and publish monthly volunteer engagement employee newsletter
- Provide counsel and manage the budget of Partner Engagement Groups (Community Involvement, Environmental Sustainability, Inclusion & Diversity, Women's Initiative Network)
- Continuously promote employee volunteer engagement and fundraising events, showing participation increases of approximately 20% yearly
- In partnership with Human Resources, integrate volunteer activities with recruitment, team-building and skill-based volunteering objectives
- Led design and creation of all branding and marketing materials and developed marketing campaign to educate and inform employees
- Negotiated partnership with over 200 Non-Profit and Community organizations
- Assisted in creation of Fitness Center and Employee Health Fair

Boards Positions

- Community Advocates (3 years)
- Havenwoods Economic Development Corp. (3 years)
- Fresh Coast Basketball Classics (3 years)
- Garfield Festival (2 years)

Committee Positions

- US Youth Games (1 year)
- YMCA Black & Hispanic Achievers (3 years)
- Professional Dimensions (2 year)

Awards

- Women Putting Their Stamp on Metro Milwaukee Honoree - Diversity Champion (2012)
- Milwaukee Urban League Young Professionals Community Achiever (2008)
- YMCA Achiever and Champion Achiever of the Year (2007)
- Well Willed Woman Honoree (2012)

Education

Business Administration and Marketing Studies, Western Illinois-University
Bachelor of Science in Community Relations and Education, UW-Milwaukee, anticipated graduation 2017

MARIA LOPEZ VENTO
4140 S. REGAL MANOR COURT
MILWAUKEE, WI 53151
(414) 755-4370 maria@hbf.org

CAREER OBJECTIVE

My career outlook is to apply my extensive experience in the philanthropic field, to have a greater impact in the Milwaukee community, as well as have the opportunity to apply my skills in a position which will further my personal and communal goals.

PROFESSIONAL EXPERIENCE

HELEN BADER FOUNDATION, Milwaukee, WI
Held several positions within the Foundation;

**PROGRAM OFFICER FOR DIRECTED GRANTS, COMMUNITY PARTNERSHIPS FOR YOUTH,
AND COMMUNITY INITIATIVES** **2006- PRESENT**

Work directly with board members

**PROGRAM ASSOCIATE FOR DIRECTED GRANTS
AND COMMUNITY INITIATIVES** **2003-2006**

Work directly with designated members of the Helen Bader Foundation's Board of Directors and Program Officers (as assigned) to conduct research, grant reviews, and assist the program and focus area assessments

- ❖ Research, recommend and monitor directed grants for Foundation founders and Linda Bader.
- ❖ Assist in organizing and provide local leadership for a funding collaborative in support of a National Initiative launched in 2000 in Southeast Wisconsin, resulting in the collection of over \$300K which was matched dollar for dollar to do grant making to build Stronger Latino Communities.
- ❖ Serve as the Foundation liaison to the Nonprofit Management Fund in a detailed review of applicant organizations.
- ❖ Assist Kathryn Dunn, Economic Development Program Officer, in reviewing requests in the Economic Development area through the understanding of current environmental factors which influence programmatic decisions in workforce and community development.
- ❖ Provided assistance to the Alzheimer's Senior Program Officer, by gathering and charting reporting information from past grantees to generate better future Foundation relationships.

EXECUTIVE ASSISTANT TO THE PRESIDENT **2001-2003**

Provided managerial and administrative support to the chief executive officer of the Foundation. Internally; functioned as the liaison between the President and staff relating to program/grant processing and communications. Externally; dealt with matters relating to applicants, grantees, community organizations and government officials.

- ❖ Assisted the President with grant processing support needs which would arise from time to time including proposal development, documentation review, research and compliance.
- ❖ Planned, coordinated and attended as needed, visits to grantee organizations and government officers.
- ❖ Provided telephone support to the President in regards to inquiries from applicants, grantees, community and political leaders.

- ◆ Provided program support for Program Related Investments including inquiries, proposal development, documentation review, research, closings and compliance.

GRANTS ADMINISTRATOR

1999-2001

Assisted program staff with applicants and grantees in performance of grant making processes and procedures; performed administrative duties related to grant tracking and program area activities and events.

- ◆ Assisted Sankofa a grass roots funding initiative in proposal development, research and compliance.
- ◆ Provided client support assistance to applicants and grantees in grant making processes and communication support for program events and presentations.
- ◆ Partnered with the local Bar Association Foundation to create a pool of nonprofit attorneys to assist our grassroots organizations to become legal 501(c) (3) entities and in turn be able to solicit funds.
- ◆ Worked closely with the Foundation's attorney on legal compliance processes for each organization receiving funding.

PROGRAM ASSISTANT

1996-1999

Provided administrative support to program staff by maintaining current data on all grantees and provided follow-up on previously funded organizations in regard to reporting requirements.

- ◆ Arranged meetings for all Program Officers, maintained program staff's schedules and assisted office manager in coordinating travel.
- ◆ Generated reports and other program related materials with Grants Administrator
- ◆ Collected, assembled and disseminated presentation information and printed materials for Board meetings and other Foundation events with Communications Director.

OPERATIONS ASSISTANT AND RECEPTIONIST

1992-1996

Worked directly with grantees and made sure their reports were received and processed accordingly. Performed a variety of administrative functions dealing with telephone support, mail intake and sorting, and general greeting to all our clients.

EDUCATION

BACHELORS OF SCIENCE-

Marquette University, Milwaukee, Wisconsin
Focus on Organization and Leadership

PROFESSIONAL CERTIFICATE IN NONPROFIT MANAGEMENT

University of Wisconsin-Milwaukee
Several Mini Certificates Completed

LANGUAGES

Fully proficient in Oral and Written Spanish

CURRENT VOLUNTEER AFFILIATIONS

Latino Arts, Board member
BoardStar, Vice President of the board
Holton Youth and Family Center, Board Member

Community Advocates Board of Directors

Client Candidate Information

Jim Liedtke
1143 North 29th Apt. 312
Milwaukee, WI 53208
414-544-3880

Background

After graduating from Boy's Tech, Mr. Liedtke enrolled at Steven's Point where he intended to pursue a career in wildlife management. However, Mr. Liedtke dropped out of college after one year and took a job with Milwaukee Electric Tool for a short time.

As his interests still centered on nature and wildlife, Mr. Liedtke left that job to become a trapper. For many years he lived a solitary but self-sufficient life in the outdoors while pursuing an unusual and "non-traditional" life style and profession.

As the occupation of trapper is not readily associated with a steady income or a 401K, Mr. Liedtke was unprepared for illness or early retirement.

Mr. Liedtke developed a serious thyroid condition that left him unable to continue trapping but he was able to live off-the-land in a small shack on land that belonged to his family. He later lived with and provided caretaker assistance for his mother when she developed Alzheimers. Eventually, Mr. Liedtke's outdoor life became "living rough" under a Milwaukee bridge in the company of other homeless individuals. Even that proved to be temporary as he along with four other people living near the bridge and railroad tracks got "evicted" by police after one member of that group damaged the brakes of a railcar. Mr. Liedtke moved further on down the tracks to a little wooded area. From there, Mr. Liedtke frequented several of Milwaukee's meal programs and received his medical and healthcare needs at St. Ben's.

Involvement with Community Advocates

Through a social worker at St. Ben's, Mr. Liedtke was introduced to CA and its services. A little more than three years ago, he agreed to meet with Project Bridge caseworker, Donald Moses at the St. James Meal site. Much to Mr. Liedtke's surprise, he was encouraged to enroll in Project Bridge and an apartment unit was identified immediately. Currently, Mr. Liedtke resides in Project Bridge permanent housing and receives other supportive services through the program.

Tom Salemy

Tom Salemy is an assistant vice president for Marquette Associates. As a member of a consulting team, Tom is actively involved in the daily management and administration of client relationships. Additionally, Tom is responsible for developing macroeconomic and capital market research. He is a member of the firm's investment committee and traditional investment manager search committee.

Before joining Marquette, Tom worked at both Eaton Vance Management and First Trust Portfolios. He began his career as a structured products analyst at State Street Global Markets.

Tom holds a B.A. in economics from Colby College. He is a CFA charterholder, a Chartered Alternative Investment Analyst (CAIA) and a member of the CFA Society of Chicago.

Esther U. Shin
Executive Vice President
Urban Strategies, Inc.

PROFESSIONAL EXPERIENCE

EXECUTIVE VICE PRESIDENT

URBAN STRATEGIES, INC., ST. LOUIS, MO

JULY 2011 – PRESENT

KEY FUNCTIONS

- Oversees Planning and Policy, which acts as the subject matter experts around family socioeconomic transformation, education, programming for children and youth, physical and mental health, housing and community development, and seniors as the project communities are undergoing physical transformation.
- Oversees the Department of Implementation, which is responsible for implementing transformative programming in our communities to support long-term positive outcomes for children, youth, adults, seniors and families.
- Develops long-term sustainable social and economic development plans for revitalizing urban communities throughout the nation through assessment, planning, implementation, resourcing and evaluation.
- Oversee resource development for the organization and individual city projects, which includes partnership development and engaging public and private support.

SPECIFIC PROJECT EXAMPLES

- Overseeing the work for the People component of three U.S. Department of Housing and Urban Development's Choice Neighborhood Implementation sites, New Orleans, Columbus and San Antonio, and two Choice Planning sites, St. Louis and Memphis.
- Project Manager for the community and supportive services planning, workforce development, and resident leadership development efforts for the revitalization of the C.J. Peete/Magnolia and B.W. Cooper public housing projects in New Orleans, Louisiana and the Cleaborn Homes public housing project in Memphis, TN.
- Coordinated the ARRA funded Strengthening Communities Fund Project in Central City, New Orleans to build the capacity of nonprofit partners in order to address the broad economic recovery issues present in the community.

SENIOR VICE PRESIDENT, HUMAN CAPITAL DEVELOPMENT

URBAN STRATEGIES, INC., ST. LOUIS, MO

JULY 2003 – JULY 2011

- Provided technical assistance to communities moving towards self sufficiency: includes, grant writing, program development, leadership training, personnel hiring and training, meeting facilitation, board development, program evaluation and research
- Coordinated community supportive service plans in conjunction with physical revitalization initiatives, focusing on a mixed-income model
- Specific grant writing experience includes; foundations, corporations, state tax credits, federal programs and local grant programs

PROJECT MANAGER

URBAN STRATEGIES, INC., ST. LOUIS, MO

AUGUST 2000 – JUNE 2003

- Coordinated the programming and staff hiring for the re-opened Adams Elementary School and attached Community Center in St. Louis, Missouri, and assisted in raising \$16.5 million for the project
- Coordinated the Human Capital Planning effort for the Barry Farm and Northwest One communities in Southeast Washington, D.C. as a part of the City Manager's revitalization efforts throughout the District.
- Coordinated the Heritage Park Policy Group in Minneapolis, MN, a consortium of local government officials, foundations, businesses and policy makers to oversee the revitalization of the Heritage Park Neighborhood on the Near Northside.

COMMUNITY DEVELOPMENT COORDINATOR

MCCORMACK BARON SALAZAR, ST. LOUIS, MO

SEPTEMBER 1998 – JULY 2000

- Implemented a neighborhood human service consortium to oversee employment and health services in the Forest Park Southeast Neighborhood as directed by a grant awarded by Housing and Urban Development to Washington University in St. Louis
- Developed a community-based welfare to work and employment training initiative to support local residents
- Coordinate charitable and community wide events for the Washington University Medical Center and BJC Health Systems

INTERN/RESEARCH ASSISTANT

U.S. SOCIAL SECURITY ADMINISTRATION, WASHINGTON D.C.

MAY 1998 – AUGUST 1998

- Compared social security privatization in the U.S. to pension programs in eighteen foreign countries
- Researched old age income security, subsistence and disability programs in the U.S. and eighteen foreign countries
- Analyzed data for the national Social Security Administration journal

EDUCATION AND TRAINING

WASHINGTON UNIVERSITY

GEORGE WARREN BROWN SCHOOL OF SOCIAL WORK

ST. LOUIS, MO

MSW 1998

Concentration: Social And Economic Development Specialization: Research

WASHINGTON UNIVERSITY

ST. LOUIS, MO

BA 1994

Majors: English Literature And Political Science Emphasis: English Composition

SELECTED PROFESSIONAL/COMMUNITY AFFILIATIONS

Board Member, Community Advocates (Chair for the Advancement Committee and member of the Capital Campaign Committee), 2008 – Present
Advisor, Policy Institute, Public Policy Institute – Pathways to Ending Poverty, 2008 - Present
Board Member, Horizons Inc., 2006 - 2009
Member, Board of Directors, George Warren Brown School of Social Work Alumni, 2001 – 2005
Member, Social and Economic Development Curriculum Committee, George Warren Brown School of Social Work, 2001 – 2004
Member, Annual Faculty and Alumni of the Year Selection Committee, Washington University in St. Louis, 2002
Member, Education Committee, Forest Park Forever, 2000 – 2002

SELECTED PRESENTATIONS/PUBLICATIONS

“Building a Comprehensive People Strategy” Choice Neighborhood Conference, Washington, D.C. 2012
“Building Healthy Communities: The Collective Impact of Community Partnerships on Health in Public Housing Communities” Washington University Medical Center Plunge, St. Louis, MO 2012
“Collaborative Community Revitalization” Promise Neighborhood Conference, Washington, D.C. 2012
“Empowering Residents Through Community Development” CDS/IASD International Conference, New Orleans, LA, 2010
“Program Evaluation for Nonprofits” Strengthening Communities Fund, New Orleans, LA 2010
“Building New Communities in the Nation’s Capital” American Planning Association National Planning Conference, Philadelphia, PA, 2007
“Women in Community Development” Women Work Conference, Washington, D.C., 2004
“Models for Community Safety and Security” Creating Livable Communities Symposium, St. Louis, MO, 2003
“Embracing the Challenge of the New Millennium” Pilot City Neighborhood Services, Minneapolis, MN, 2002
“A Case Study: Murphy Park and the COVAM Community” Urban Land Institute, Chicago, IL, 2001
“Community Based Grantwriting” Annie E. Casey Making Connections, St. Louis, MO, 2000
“Social Security Bulletin” Social Security Administration, Washington, D.C., 1998

TECHNOLOGY SKILLS

Fluent in Windows, Excel, Publisher and PowerPoint
Statistical programs include SAS and SPSS
Experience with Microsoft Access and Tracking At A Glance

Thelma Sias

- **Vice President – Local Affairs**
We Energies



Thelma Sias was appointed vice president – local affairs in 2003. Sias is responsible for building and enhancing long-term relationships with community leaders and local government to garner support and approval for critical corporate initiatives. Sias directs activities to monitor community concerns and negotiate with local government on policies that impact company operations. Under her leadership, Local Affairs addresses the service needs of We Energies municipal customers and school districts — the total annual revenue of which exceeds \$230 million.

Sias joined the company in 1986 and has served in a variety of leadership roles within the organization. As a member of the customer relations leadership team in the roles of director – community affairs and director – local affairs, she has laid the groundwork for several key growth initiatives for the company. In 2002, Sias was named assistant vice president – local affairs. Sias also is a board member of the We Energies Foundation.

A resident of Milwaukee, Sias received a bachelor's degree from Clark College, now Clark Atlanta University, in Atlanta. She is a member of the Rotary Club of Milwaukee Inc. and Professional Dimensions Inc. She currently serves as a 2014 Community Campaign Co-Chair for the United Way of Greater Milwaukee. Additionally, Sias is a member of many civic, community and nonprofit boards, including:

- Cardinal Stritch University Board of Trustees
- Zoological Society of Milwaukee
- Children's Hospital Foundation Board
- Milwaukee Public Library Foundation
- Asset Builders of Wisconsin
- African-American Women's Fund Project
- Community Advocates
- Greater Milwaukee Diversity Committee
- Milwaukee Area Workforce Development
- Usher's New Look Foundation Milwaukee Advisory Council

In recognition of her commitment to community service, Sias has received numerous awards from civic and professional organizations and corporations including the following:

- Sacagawea Award, Professional Dimensions Inc.
- McDonalds 365Black Award
- The Business Journal of Milwaukee Women of Influence Award
- Black Excellence Award, Milwaukee Times Newspaper/Fox 6

Kate E. Venne

203 W. Lloyd Street ♦ Milwaukee, WI 53212

414.406.1476 ♦ katevenne1@gmail.com

Summary of Qualifications:

- Sixteen years experience in communications, public relations and branding.
- Experienced spokesperson and media relations professional.
- Significant nonprofit experience and community involvement.
- Connected to community leaders, donors, reporters and elected officials in Milwaukee.
- Knowledge of local, county and state governmental entities and the lobbying process.
- Passion for all things Milwaukee.

Professional Experience:

VP of Planning, Rogers, LeMonds and Associates

Director of Public Relations, Capstone National Partners

Jan. 2010-Present *Capstone's PR practice merged with Bryan LeMonds in Sept. 2014

Public relations, public affairs and branding services to national clientele

- Responsible for brand planning for all clients, ensuring that all messages properly reflects the brand lens.
- Launched tech start-up Geppetto Avatars at SXSW 2014. Created content for website, successfully pitched and placed national and local stories on the Mequon-based company.
- Coordinated multiple grand opening and groundbreaking events for Madison-based Gorman and Company, including substantial media coverage.
- Helped Uber navigate the City of Milwaukee's legislative process.
- Messaged leadership transition for Cream City Foundation.

Director of University Communication, Marquette University

October 2010-November 2012

Positioning the university as a leading institution on a local, regional and national level

- Developed strategy, talking points, and served as spokesperson for multiple issues.
- Pitched and placed positive, brand-building university stories to local, regional and national reporters.
- Led public relations efforts for the College of Education and the School of Dentistry, with several successful story placements.
- Helped to secure \$8 million in state funding for the School of Dentistry and led communications campaign to secure an additional \$3 million in private funding.

Director of Communications, Wisconsin Housing and Economic Development Authority

March 2006-October 2010

Telling the story of the authority's unique business units to multiple audiences and business partners

- Oversaw all public relations and marketing functions of the authority, including leading all messaging during capital market crisis in 2008-2009.
- Served as press liaison to the Governor's office.
- Managed three advertising campaigns with budgets between \$250,000 and \$350,000 and led rebranding effort for entire authority.
- Managed staff of five.

**Manager of Public Affairs, AIDS Resource Center of Wisconsin
December 2004-March 2006**

Promote the work of a medium nonprofit to the people behind the funding sources

- Managed \$300,000 public awareness campaign on HIV testing.
- Successfully secured a \$1 million increase in state AIDS funding.
- Instituted agency's annual public policy agenda.
- All other communications duties as listed below.

Manager of Communications

September 2003-December 2004

- Developed communications strategy for agency.
- Wrote press releases, pitched and placed feature-length stories with statewide media outlets.
- Editor and lead writer of donor newsletter, annual report and other agency publications.
- Supervised graphic designer and production of all print agency materials.

Development Associate

June 2002-September 2003

- As lead foundations and corporations grant writer, raised \$620,000 annually toward \$2 million private revenue goal while securing more than \$50,000 in new foundation revenue.
- Assisted in annual campaign and special events.

Public Education Specialist North Shore Fire Department

March 2000-May 2002

Coordinated all public information needs as well as fire safety activities

Greenfield Observer Reporter CNI Newspapers

July 1998-March 2000

Reported on news and features for the community of Greenfield, Wisconsin

Education

B.A. Degree Winona State University - Winona, MN, May, 1998

- Majors in Mass Communication and Political Science; Minor in Public Administration

Civic/Community Leadership

Community Advocates, Member, Board of Directors (May 2011 to present)

Wildspace Dance Company, Member, Board of Directors (January 2011 to present)

Bottomless Closet, Member & President, Board of Directors (June 2008 to April 2011)

Milwaukee Women's Center, Member, Board of Directors (May 2006-May 2007)

References

Available upon request

JODI L. WIRE
1121 North Edison Street
Milwaukee, Wisconsin 53202
414-810-8151
jwire@tds.net

Profile

- Well-respected leader with proven success in the customer service, contact center, credit and collections environments.
- Significant experience in leading process and operational improvements related to customer satisfaction, quality, productivity, and employee engagement.
- Recognized for ability to work well in fast-paced, dynamic, and high pressure environments with diplomacy and professionalism.
- Strong commitment to and success with people development, skills enhancement with a focus on creating next-level, future leaders.

Core Competencies

- Leadership – Extensive experience leading various teams, process improvements and initiatives; strong focus on increasing customer service performance, employee engagement and leadership development.
- People Skills – Proven success in building strong, motivated teams and implementing cultural changes.
- Customer Focus – Successful at driving superior customer service performance via quality/process improvements, and communicating and delivering value to customers through strategic, effective relationships with Customer Experience, Customer Research and peer teams – with a goal of building long-term customer loyalty.
- Continuous Improvement – Highly effective at identifying, developing and implementing strategies and actions for productivity, process, and quality improvements to meet/exceed organizational goals.

Professional Highlights

WE ENERGIES, MILWAUKEE, WISCONSIN, 1991-Present

Director – Credit and Collections Strategy and Operations

2012 - Present

Responsible for the development, implementation, coordination, integration and communication of credit and collection strategies, tactics and policies that incorporate a holistic view of the various processes and sub-processes across EDBU.

Manager – Residential Customer Contact Center

2008 - 2012

Responsible for developing the strategies and manages the work for the Residential Customer Contact Center with the objective of completely satisfying our residential customers through the effective handling of inbound/outbound calls, email, and other customer contact channels. Responsible for ~3million customer contacts annually.

Manager – Collection & Litigation

2003 - 2008

Responsible for strategically planning, designing, implementing and assessing the effectiveness of the operational activities for the overall Collection & Litigation processes.

Call Center Team Leader – Milwaukee Customer Contact Center

2001-2003

Responsible for managing the quality, performance and productivity of 15-20 Telecollectors to meet call center guidelines and corporate policies with the goal of providing excellent customer service.

EDUCATION

B.A. – Management and Communications

Concordia University – Milwaukee, Wisconsin

summa cum laude – Dec 2011

Paralegal Studies Certification Program

American Institute for Paralegal Studies – Milwaukee, Wisconsin, 1996

PROFESSIONAL AFFILIATIONS/DEVELOPMENT

- Community Advocates Board Member
- We Energies Management Development Network – Founding, Steering Committee member.
 - A professional network with a mission to provide members of We Energies' management with opportunities to: grow professionally and enhance leadership skills, learn more about the company, and develop relationships and improve collaboration between business units.
- UWM Sheldon B. Lubar School of Business – Essentials of Leadership Program – 2008/2009
- UWM Sheldon B. Lubar School of Business – Strategic Leadership Series – 2013/2014
- Customer Services Conference – 2005 Chairperson

Attachment B

Client-centered Services



Unique Kiosk Information Centers

Upon arrival, customers can use one of CA's individual kiosks to begin their energy assistance enrollment process. After seeing an initial welcome screen, individuals can easily follow on-screen directions to enter information that will guide them through the application process. The system will flag additional services that may be required.

The kiosk system is unique to CA and is a user-friendly, efficient tool that helps put customers at ease.

A Focus on Accessible Service

Community Advocates' facility is fully ADA accessible.

Priority service is given to all seniors and individuals with disabilities. A wheelchair accessible service window is available to clients and eliminates disruptive and embarrassing situations for clients by allowing them the same service considerations available to all customers.

A staffer does not have to single out our clients by providing service in a traffic area. Customers do not have to juggle forms and clipboards on their laps or otherwise be inconvenienced.

Community Advocates is dedicated to furthering our mission that "all people will be treated with dignity".



Personalized Attention



A Professional Atmosphere

A clean, bright and spacious waiting area allows customers to relax during their short wait-time.

A children's area, pictured in the background, is equipped with a blackboard and chalk. CA staff retains a few of the previous day's artistic creations to encourage new, young visitors to add their own pictures and messages. Other drawing supplies and toys are provided for kids who accompany their parents.

CA ensures that customers are comfortable during their visit.



Access to Other Useful Information

Customers can learn about CA services and other Milwaukee resources.



Considerate One-on-One Assistance

Each of CA's energy assistance service windows is staffed by considerate, helpful employees. Whether the customer is signing in, needs special attention prior to their appointment or simply has a question, they can count on an immediate personal response. The window areas allow for privacy with no crowding or lines that might unnecessarily hurry a client or distract energy assistance workers.

Window areas are kept uncluttered presenting a professional and simple service area that allows staff to concentrate on the customer.

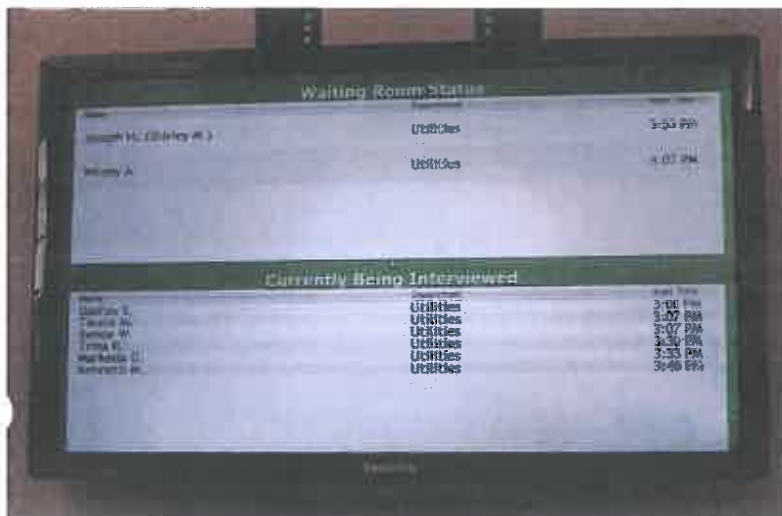


Private Fully-equipped Client Interview Rooms



Every energy assistance customer or household is able to meet their assigned Energy Assistance Enrollment Specialist in a permanent interview room located immediately adjacent to CA's waiting area. Behind closed doors, all customers are assured of privacy and confidentiality. These dedicated interview rooms eliminate any interruptions or distractions so that applications can be completed quickly and completely.

Internal Energy Assistance Appointment Screens



CA has installed wall-mounted appointment screens in the enrollment area that display the name of the next client to be served, those currently being interviewed, elapsed waiting and service time and the specific service needed. This internally designed system also allows Energy Enrollment Specialists to use the screen to identify and fill open appointment slots for new applicants.

Fully-staffed Bi-lingual Call Center



Community Advocates is adept at managing the high volume of calls generated by the Energy Assistance Program.

The Call Center system allows Community Advocates to monitor the incoming call volume and respond quickly to ensure that 80%+ of Energy Assistance callers are answered within 35 seconds.

Call Center staff can respond to Spanish and English speakers and are trained to quickly assist other non-English speakers through referral to services and resources of collaborating agencies or entities.

Attachment C



Department of Neighborhood Services
Inspectional services for health, safety and neighborhood improvement

Art Dahlberg
Commissioner
Thomas G. Mishefske
Operations Manager

March 25, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

On behalf of the Department of Neighborhood Services I recommend that Community Advocates' proposal to deliver the 2015 Energy Assistance program for Milwaukee County be given the most positive consideration. Your implementation of the Relocation Assistance program and Rent Assistance program for the Department has achieved and surpassed the stated program outcomes and goals. The professional program operations you have provided indicate that consistent and similar successful outcomes can be achieved for Milwaukee County's WHEAP.

Proficiencies, strategies and innovative implementation can easily transfer to other programs that require similar inputs and result in successful program delivery that includes personal attention to diverse client needs. This is the strength of Community Advocates.

CA's service delivery is strategically and methodically determined to best serve the grantor and the client. However, Community Advocates is an agency that can also react quickly and adjust services, systems and outreach efforts to best assist clients while attending to the deliverables required by government contracts.

The Department of Neighborhood Services wholeheartedly supports your application to provide WHEAP services for all of Milwaukee County. We further will assist in outreach efforts by distributing energy assistance information.

Sincerely,

A handwritten signature in black ink, appearing to read "Tom Mishefske".

Tom Mishefske, Operations Director



March 23, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

As Director of the Milwaukee office of Disability Rights Wisconsin (DRW) I am pleased to provide this letter in support of Community Advocates' proposal to administer Milwaukee County's Wisconsin Home Energy Assistance Program (WHEAP).

Based upon our longstanding collaborative and cooperative efforts, I believe Community Advocates can provide the expertise, organization and commitment needed to successfully operate the Energy Assistance program in Milwaukee County.

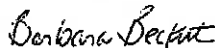
Disability Rights Wisconsin is the federally mandated protection and advocacy agency for Wisconsinites with disabilities, designated by the Governor to protect the rights of Wisconsinites with disabilities. We serve people with disabilities of all ages, including people with developmental disabilities, people with mental illness, people with physical or sensory disabilities, and people with traumatic brain injury, helping them to overcome barriers to independence and identify the right community support services. Therefore, we understand the need to offer services that are convenient and accessible to all.

Our Milwaukee office frequently makes referrals to Community Advocates to connect people with disabilities with assistance related to their most urgent and basic needs (like housing, healthcare, energy assistance). Community Advocates an important source to connect our clients with the services and resources they need, and your staff also works to ensure that people are treated with respect and with an awareness of individual needs.

I believe that Community Advocates has the experience and capacity to deliver responsive, skilled, and people-focused services to Milwaukee County individuals and families in need of WHEAP energy assistance, as well as to provide accountable and effective administration of this program. Additionally, we will partner to distribute other outreach materials to prospective clients and provide enrollment assistance.

On behalf of DRW, I strongly support Community Advocates' proposal to administer Milwaukee County's WHEAP and recommend that Milwaukee County grant Community Advocates the 2015 WHEAP contract.

Sincerely,



Barbara Beckert
Director – Milwaukee Office

MADISON	MILWAUKEE	RICE LAKE	
131 W. Wilson St. Suite 700 Madison, WI 53703 608 267-0214 608 267-0368 FAX	6737 West Washington St. Suite 3230 Milwaukee, WI 53214 414 773-4646 414 773-4647 FAX	217 West Knapp St. Rice Lake, WI 54868 715 736-1232 715 736-1252 FAX	disabilityrightswi.org 800 928-8778 consumers & family

March 20, 2015

Ms. Andrea Elliott
Chief Executive Officer
Community Advocates, Inc.
728 N. James Lovell St.
Milwaukee, WI 53233

Dear Ms. Elliott,

I am providing this letter as support for your proposal to deliver Milwaukee County's Energy Assistance program. I am well aware of the positive impact your programs have on thousands of Milwaukee's low-income residents. I believe that Community Advocates will continue to deliver the most effective outreach, crisis assistance, screening and enrollment services to Milwaukee County residents in need of assistance with utilities costs.

The YWCA Southeast Wisconsin is dedicated to eliminating racism and empowering women. We fulfill our mission by providing resources and employment training to individuals facing poverty and discrimination, helping them to achieve economic success. At the same time, we offer racial justice education that aims to eliminate disparities that disproportionately impact people of color. We offer a combination of racial justice, economic empowerment, and workforce development programs to help create a more just and equitable community.

As economic empowerment is one of our three priority areas, we understand the benefits to our clients and to the entire Milwaukee community.

We have collaborated in a number of efforts that promote the compatible missions of both agencies and I know first-hand that CA is committed to advocating for and empowering those who have known poverty and bias.

I am confident that your agency is well qualified to deliver accessible and efficient energy assistance services. On behalf of the YWCA Southeast Wisconsin, I give my unqualified recommendation that Milwaukee County award the contract to Community Advocates.

Sincerely,



Paula Pennebaker, CEO



Hope House of Milwaukee, Inc.

209 West Orchard - P.O. Box 04095
Milwaukee, WI 53204

Ending homelessness and creating healthy communities

March 12, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

Please accept this letter expressing my strong support for Community Advocates' proposal to operate Milwaukee County's 2015 Wisconsin Home Energy Assistance Program (WHEAP).

Based upon my own experiences, those of my staff, and the reported experiences of our clients, I believe that Community Advocates has the capacity to best deliver the services required by this program in a way that is effective and client-centered.

Hope House and Community Advocates have a long history of cooperation and share resources, strategies and knowledge about the needs of Milwaukee's more vulnerable persons and families. Whenever possible, the staff at Hope House refer our clients to Community Advocates for additional services because they will have access to quality services that help change lives.

We value CA's track record of efficiently providing convenient energy assistance application services, crisis services, and outreach for Milwaukee County, while ensuring that clients are always treated with respect. Should Community Advocates be granted this contract, Hope House will also help in outreach efforts by making all informational materials available and will help our clients enroll in the program.

On behalf of Hope House, I am pleased to support your proposal to provide WHEAP services in Milwaukee County. The comprehensive and workable plan you are proposing will assure more accessible energy assistance for the thousands of individuals and families who rely on this help in order to meet the rising costs of their basic household needs. I strongly urge Milwaukee County to favorably consider Community Advocates proposal.

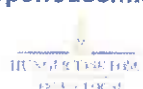
Sincerely,

Wendy Weckler
Executive Director

Phone (414) 645-2122

www.hopehousemke.org

Fax (414) 645-2249



March 17, 2015



Greater Milwaukee
& Waukesha County

David J. Lubar
Chairman of the Board

May Lou Young
President & CEO

Ms. Andrea Mallmann-Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am providing this letter to let you know that United Way of Greater Milwaukee strongly supports Community Advocates' proposal to provide outreach, crisis and enrollment services for the 2015 Milwaukee County Energy Assistance program. United Way brings together partners from business, education, government, faith-based and nonprofit organizations to work toward common goals, resulting in a better quality of life for all.

United Way is Greater Milwaukee's largest community-based investor in health and human services. For many years, we have helped fund several of your programs in various service areas. Based upon our program evaluations, Community Advocates has consistently met or surpassed our stated goals. We are also aware of and recognize CA's successful implementation of innovative systems that have helped streamline the current program.

As income is one of our three priority areas of interest, we understand how important this program is to so many Milwaukee County residents who have difficulty in meeting rising utility costs. To further assist Milwaukee's low-income residents, we agree to notify all United Way funded agencies about access to CA's Energy Outreach information and materials so that this program can be available to all who qualify.

I am convinced that because of your deserved reputation for helping thousands of clients while treating each one as an individual, Community Advocates can successfully deliver this program for our community.

Sincerely,

A handwritten signature in black ink that reads "Nicole Angresano".

Nicole Angresano, Vice President of Community Impact

GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED®

Main Office: 225 West Vine Street, Milwaukee WI 53212 | 414.263.8100 | UnitedWayGMWC.org



March 19, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 N James Lovell St
Milwaukee, WI 53233

Dear Ms. Elliott,

SET Ministry is grateful for the opportunity to offer its support for Community Advocates' Wisconsin Home Energy Assistance Program (WHEAP) proposal to Milwaukee County. We also agree to help in this effort by providing Community Advocates' (CA) outreach materials to the hundreds of qualified applicants receiving our services. Our efforts to reach this specific population will support them on their pathways to increased self-sufficiency.

SET is a Milwaukee community-based health and human services agency. SET builds pathways to increased self-sufficiency for over 4,000 people of all ages each year in Milwaukee's central city by Inspiring Hope through Healing, Uncovering Capabilities and guiding parents to Redefine Life, for themselves and their children.

Working with your organization as a member of Milwaukee Brighter Futures for a number of years, I am impressed by the collective results achieved through CA's leadership. As the chief architect of the coalition, you skillfully manage 80+ members to design effective strategies that prevent child abuse and neglect, build stronger families and improve neighborhoods.

This solid leadership will serve the Energy Assistance Program as well, I believe. The plan you are proposing is comprehensive, practical, and promises to ensure readily accessible energy assistance to the thousands of families and individuals who depend on it so they can keep a roof over their head and have heat and electricity, too. Milwaukee County will benefit from your agency's effective administration and accountability.

I urge Milwaukee County to look favorably on Community Advocates' proposal and award it the 2015 WHEAP contract.

Sincerely,

Laurene Gramling Laehn
President and CEO

LGL/bhs

TURNING HOPELESSNESS into HOPE

2977 North 50th Street ■ Milwaukee, WI 53210
PH 414/449-2680 ■ FAX 414/442-1770 ■ www.setinc.org



833 North 26th Street
Milwaukee, WI 53233

Phone 414-344-7676
Fax 414-344-7739
www.penfieldchildren.org

March 13, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott:

I'm writing this letter in support of your proposal to provide the Energy Assistance Program for Milwaukee County. I sincerely believe that your organization will operate an inviting, efficient and diverse client-centered program. So many of our families have other needs beyond those provided by our agency and we feel secure in referring many families to your organization for assistance.

As a leader in child development, we help infants and young children with and without disabilities to reach their full potential through education, therapy services and family programs. As part of Community Advocates' Brighter Futures Initiative, we provide life-changing programs for these children and advocate for their supportive families.

Penfield serves over 1,700 children annually and many of their families are in need of assistance with basic services. For this reason, we agree to offer and distribute information materials to help increase and ease access to Milwaukee County's Energy Assistance program as implemented by Community Advocates.

We are aware of Community Advocates' successful service provision and encourage Milwaukee County to positively consider your request. If I can provide additional recommendations, please contact me at 414-345-6300.

Sincerely,

Christine P. Holmes
President & CEO



Creating opportunities
to overcome adversity

Wisconsin Community Services
3732 W. Wisconsin Avenue, Suite 206
Milwaukee, WI 53206
Phone (414) 290-0400
Fax (414) 271-4605
www.wiscs.org

March 17, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am writing to express my strong support for Community Advocates' proposal to administer Milwaukee County's 2015 Wisconsin Home Energy Assistance Program (WHEAP), because I believe Community Advocates is best positioned to deliver Milwaukee County enrollment, outreach, and crisis energy assistance services while emphasizing client service.

Wisconsin Community Services (WCS) has worked with high-risk individuals both inside and outside of the criminal justice system since 1912. WCS operates over 40 programs throughout southeastern Wisconsin (including Milwaukee, Waukesha, Sheboygan, and Kenosha Counties). Over 260 WCS employees serve more than 15,000 people per year. WCS advocates for justice and community safety, providing innovative opportunities for individuals to overcome adversity. Most of our clients lack income security, education, or other mainstream means to securing their basic needs.

For this reason, Community Advocates is one of our valued partner agencies, as we know our clients will be connected efficiently with the resources they need, in a way that maintains their human dignity at all times. Community Advocates' successful track record has earned your agency a respected reputation in the community. Professionals and clients alike know that you will provide personalized, accessible, client-centered service focused on achieving results.

Over the years, we have often sent our clients to you so that they could meet their energy assistance needs. Your staff has always helped them, quickly and professionally, to move through a crisis and to help plan for an independent, successful future.

Because of your track record, experience, and capacity, I believe Community Advocates is the best and most prepared agency to serve the thousands of individuals and families in Milwaukee County in need of energy assistance services. We hope to be of further service by collaborating with you in your outreach efforts to Milwaukee County residents who are eligible for energy assistance.

Sincerely,

Holly Patzer
Executive Director

WCS advocates for justice and community safety, providing innovative opportunities for individuals to overcome adversity.





521 NORTH 8TH STREET
MILWAUKEE, WI 53233-2404
TELEPHONE: 414/727-5300
FAX: 414/291-5488
WWW.LASMILWAUKEE.COM

KIMBERLY R. WALKER
Executive Director

March 16, 2015

Ms. Andrea Mallmann-Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

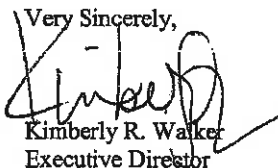
The Legal Aid Society of Milwaukee strongly supports Community Advocates' proposal to manage Milwaukee County's Wisconsin Home Energy Assistance Program (WHEAP). Community Advocates has a long-established reputation for serving Milwaukee's poorest populations with the provision of basic needs. We know that Community Advocates serves thousands of customers each year and, yet, each client is treated as an individual with unique needs and unique solutions.

Founded in 1916, the Legal Aid Society of Milwaukee seeks *"to do all things necessary for the prevention of injustice."* Each year the Society provides free legal services to 8,000 of Milwaukee's most vulnerable residents:

Legal Aid Society staff attorneys meet with clients at ten sites throughout the community, including its conveniently located Downtown office and its quarters in the Children's Court Center. Staff attorneys conduct regular outreach sessions at St. Benedict's Community Meal Program, The Gathering Meal Program at St. James Church, Christian Faith Fellowship Church Meal Program, Sixteenth Street Community Health Center, MLK Heritage Clinic, the COA Goldin Center, and Sojourner Truth House for victims of domestic violence.

We have the resources and are very willing to assist Community Advocates in its outreach efforts through distribution of energy assistance information at each of these sites.

Because Community Advocates has developed and established such an effective model for assisting clients with energy assistance, Legal Aid Society fully supports your work. We hope that you will be given the most positive consideration for your proposal to administer the WHEAP program in Milwaukee County.

Very Sincerely,

Kimberly R. Walker
Executive Director

EQUAL JUSTICE FOR THE POOR SINCE 1916



FOR TEEN GIRLS INC.

March 16, 2015

Ms. Andi Elliott, Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am writing to express my strong support for your proposal to administer Milwaukee County's Wisconsin 2015 Home Energy Assistance Program (WHEAP).

PEARLS for Teen Girls, Inc. is a dynamic and innovative non-profit leadership development organization serving at-risk, primarily African American and Latina girls, ages 10 to 19 in Milwaukee, Wisconsin. As a partner in Community Advocates' Brighter Futures, PEARLS helps girls achieve in school, avoid teen pregnancy, and use their personal power to achieve their goals and dreams.

We are also aware that the families of many of our girls may need assistance in meeting basic needs including energy assistance. We know that Community Advocates has assisted these families in the past making the experience one that is convenient and empowering while always treating them with the dignity they deserve. We are happy to assist CA in outreach by distributing and making available all materials and information that will help the girls and their families enroll in the Energy Assistance program.

Again, I sincerely support Community Advocates' application and hope that Milwaukee County will grant the 2015 contract to you.

Sincerely,

A handwritten signature in black ink that reads "Danae D. Davis". The signature is written in a cursive, flowing style.

Danae D. Davis
Chief Executive Officer

2100 N. Palmer Street • Milwaukee, WI 53212
Phone: 414-265-7555 • Fax: 414-265-0500 • E-mail: info@pearlsforteengirls.com
www.pearlsforteengirls.com

Centro Hispano Milwaukee

March 13, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

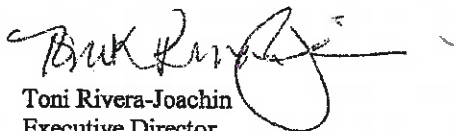
This letter indicates my unequivocal support for Community Advocates' proposal to administer Milwaukee County's Wisconsin Home Energy Assistance Program (WHEAP). Of all the agencies that might have the capacity and capability to administer this program, I believe Community Advocates is best suited as Milwaukee County's provider of energy assistance outreach, enrollment, and crisis services, because your agency has a well-known track record of putting clients first, helping them to retain their sense of humanity even as they face very difficult life circumstances.

Centro Hispano Milwaukee has been advocating on behalf of Latinos and the socially and economically challenged since 1964. We offer programs in education, housing, and human services to improve quality of life for families, children, youth, and the aging; promote cultural, racial and linguistic understanding; and facilitate community planning and development supportive of social and economic equity. More than 12,000 individuals are served annually by our many programs and initiatives. By helping advance the outreach component of your proposal, we can also assist our clients and their needs for affordable utilities services.

Centro Hispano Milwaukee has one unifying belief: that even those experiencing social and economic challenges should have equal access to the tools necessary to fulfill personal and family goals and economic self-sufficiency. In working with you and your staff over the years, Centro Hispano Milwaukee has seen how Community Advocates operates under this same belief. Your agency's skilled and results-focused advocacy ensures that all people – no matter of their race, ethnicity, income, or status in life – have access to the basic resources they need to live safe and healthy lives.

Because of your organization's successful management, extensive reach into the community, and your ability to administer a program like WHEAP, Community Advocates is my choice to administer the program.

Sincerely,



Toni Rivera-Joachin
Executive Director
Centro Hispano Milwaukee



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27th Street
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Association

Jesus Santos
Milwaukee Public Schools

614 W National Ave
Milwaukee WI 53204

www.centrohispanomke.org

Ph: 414.384.3700



Journey House Center for Family Learning and Youth Athletics

2110 West Scott Street

Milwaukee, WI 53204

414-647-0548 Phone

www.journeyhouse.org

www.facebook.com/journeyhouse

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Michele Bria, Ph D
Chief Executive Officer

March 18, 2015

Ms. Andi Elliott, CEO
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am writing to indicate my support for Community Advocates' proposal to administer Milwaukee County's 2015 Wisconsin Home Energy Assistance Program (WHEAP).

Journey House values Community Advocates skill and success in helping our clients and thousands of others throughout Milwaukee meet their most basic and urgent needs. I believe Community Advocates will be an excellent administrator of this program.

Established in 1969, Journey House's mission is to work with the Clarke Square Neighborhood on the near south side of the city, utilizing a self-help philosophy, in order to increase education, reduce unemployment and crime, strengthen families, and revitalize neighborhoods.

Journey House begins with the conviction that everyone has (a) the right to a high quality of life and (b) the basic assets for attaining it. Even more, we believe that our clients should be able to attain these basic assets in a way that respects their human dignity. We would never want them to be reduced to a number, or even just a name. Like Journey House, Community Advocates provides services with this same attention to individuals' personal needs. Whenever possible, we send them to Community Advocates. Now that your agency has moved to a more central location downtown, your services are even more accessible to our clients from the south side. Journey House will also assist Community Advocates in its outreach efforts by making available all energy assistance information, help with scheduling appointments and will feature that information in our newsletter.

I am impressed with your proposal to serve clients from all over the city with outreach, enrollment, and crisis services. If you are granted the WHEAP contract from Milwaukee County, even more individuals and families will be able to have the positive experience of being helped by Community Advocates. I am pleased to recommend Community Advocates as the most capable and appropriate administrator of this contract, and I hope Milwaukee County agrees.

Sincerely,

Dr. Michele Bria
Chief Executive Officer





March 19, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Cindy Krahenbuhl
Executive Director

Dear Ms. Elliott,

Board of Directors:

Mark Berquist
President

I am writing this letter on behalf of The Guest House to show support for Community Advocates' proposal to administer Milwaukee County's 2015 Wisconsin Home Energy Assistance Program (WHEAP).

Patrick Dunphy
Vice President

The Guest House is most commonly known as a homeless shelter for men. We are the largest publicly funded emergency shelter in Milwaukee. Established in 1982 by area churches, The Guest House has evolved from a simple drop-in center to offer a sophisticated suite of housing, education, substance abuse treatment and pre-employment preparation programs.

Judeen Schulte
Secretary

The Guest House and Community Advocates share a commitment to eradicating homelessness by putting men and women on the road to self-sufficiency. To help achieve that goal, we share strategies, resources and knowledge about the needs of our City's most vulnerable people, particularly the homeless.

Gail Buenger
Treasurer

Like us, Community Advocates provides numerous programs and services to help people get back on their feet. Your record of providing efficient assistance application services, and outreach for Milwaukee County makes CA the go-to organization for those in energy crisis situations. And your agency's "open door" policy—accepting walk-ins five days a week—and unfailing courteous and respectful treatment of clients speaks volumes about your professionalism and overall effectiveness.

Andy Anderson
Robert Heu Chun
Gregory Griffin
Vickie Hinds
JoAnn Lomax
Tracy Meeks
Marie Millard
John Washcovick

Many more families and individuals will benefit from being helped by Community Advocates if your agency is granted the WHEAP contract by Milwaukee County. I commend you for your service excellence, and highly recommend that Community Advocates be granted the 2015 WHEAP contract by Milwaukee County. We agree to make all Community Advocates' energy assistance information available to our clients to promote self-sufficiency after homelessness.

Sincerely,

Cindy Krahenbuhl
Executive Director



The Guest House • 1216 N. 13th St. • Milwaukee, WI 53205 • 414.345.3240
www.guesthouseofmilwaukee.org





*Moving people beyond
the challenges of poverty*

March 18, 2015

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Karen W. Higgins

Ms. Andi Elliott, Chief Executive Officer
Community Advocates, Inc.
728 N. James Lovell St.
Milwaukee, WI 53233

Dear Ms. Elliott,

I have recently returned as Executive Director of the Milwaukee Christian Center and want to express my support for your proposal to provide Wisconsin Home Energy Assistance Program services for Milwaukee County. I know and am gratified that CA and MCC have collaborated and cooperated in more than several efforts to assist Milwaukee's low-income families including Brighter Futures.

We both believe that all people deserve to be treated with compassion and respect. We exist to move people beyond the challenges of poverty through life-affirming programs and supportive services.

I am also aware of your ability to serve individuals in a manner that makes them feel valued rather than just a number. Energy assistance helps thousands of individuals and families each year. I believe that Community Advocates has the capacity and experience to provide enrollment services and crisis assistance to people at locations and at times that are both convenient and do not compromise a person's dignity.

I respect CA's reputation and ability to deliver efficient and accountable programming while respecting the integrity of each individual. I am pleased to support your proposal and will participate in outreach efforts to help distribute information and encourage all eligible clients to enroll in this important program by using the effective systems and locations provided by Community Advocates.

Sincerely,

Karen Higgins
Executive Director



807 S. 14th Street • Milwaukee, WI 53204 • 414-645-5350 • FAX: 414-645-1859 • www.mccwi.org



March 12, 2015

Ms. Andrea Mallmann-Elliott, Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am writing to express my strong support for your proposal to administer Milwaukee County's Wisconsin 2015 Home Energy Assistance Program (WHEAP).

The mission of The Parenting Network is "to strengthen parenting and to prevent child abuse." Since 1976, we have worked to empower anyone in a parenting role – mothers, fathers, grandparents or other relatives raising children, stepparents, foster parents, adoptive parents – to provide a safe and nurturing home for their children. Our programs and services include a confidential Parent Helpline, peer support groups, and home visiting services.

Our teen pregnancy prevention program has been recognized and funded by Brighter Futures and our partnership with Community Advocates through this program has been rewarding and successful. We will look forward to further success by supporting Community Advocates outreach efforts outlined in your proposal.

Community Advocates is an agency to which our staff regularly refers families in need. Many families need help maintaining housing, securing the healthcare they need, and/or keeping their lights and heat on. Our Parent Helpline staff also often need to make referrals to community resources in order to help struggling families meet their needs and stabilize households. We know that we can send them to you and, in short order, they will have access to these things.

My staff and I value your agency's skilled and results-focused advocacy that so reliably helps those we send to you. Because of your successful and extensive track record with our clients (and thousands of other Milwaukee citizens in need), and because of the responsible management and leadership you have brought to your agency, I believe Community Advocates is the best choice to administer the WHEAP contract for Milwaukee County.

Community Advocates shares The Parenting Network's strengths-based, positive approach to families in need, and that is the sort of approach we want to see for the outreach, enrolment, and crisis energy assistance services that will be provided through this program. On behalf of The Parenting Network, I strongly urge Milwaukee County to choose Community Advocates as the community's WHEAP provider.

Sincerely,

Joyce Felker, Executive Director

7516 West Burleigh Street • Milwaukee, WI 53210-1030
Business 414/671-5575 • Fax 414/671-1750 • Parent Helpline 414/671-0566
www.theparentingnetwork.org





Promoting Safe and Stable Homes,
Healthy Youth and Strong Families Since 1976

March 18, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

Dear Ms. Elliott,

I am writing to express my strong support for Community Advocates' proposal to administer Milwaukee County's Wisconsin 2015 Home Energy Assistance Program (WHEAP). I have had many years of experience working with you and your organization within Milwaukee's Continuum of Care and as a recipient of funding through the Brighter Futures collaboration. As such, I have been pleased with your leadership, your fiscal responsiveness and well-organized administration, and your distinct awareness of the reality in which our clients are living each and every day.

The mission of Walker's Point Youth & Family Center is to meet the needs of runaway, homeless, and other troubled youth and their families from Milwaukee's diverse communities by providing services to empower youth, help them resolve personal and family problems, strengthen family relationships, and support safe and stable homes. We offer shelter, counseling, educational and other services to help young people resolve their problems and strengthen family relationships.

Teens who come to us for help are usually doing so because they are having serious problems at home. Many leave home because of reported physical or sexual abuse or neglect. Many of these teens also come from alcohol or drug addicted families.

We often need to refer our youth and families to agencies like yours that can help them access the resources they need to live more secure, stable, and healthy lives. Community Advocates' provision of basic needs services in the areas of housing, healthcare, energy assistance, and more is consistently skilled, compassionate, caring and successful.

Because Community Advocates is so skilled at delivering basic needs services in a way that is client-centered, I believe Community Advocates is the best agency to deliver the energy assistance outreach, enrollment, and crisis services of the WHEAP contract in Milwaukee County. I wish you success in your application.

Sincerely,

Andre L. Olton, Ph.D.
Executive Director

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Executive Director



TEEN CRISIS &
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Milwaukee, WI 53204-1147
414-647-8200

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Transitional Housing for
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2176 South Lytton Boulevard
Milwaukee, WI 53215-2456
414-672-1360

VISIONS
Transitional Housing for
Youth 16-17 Years Old
732 S. 21st Street
Milwaukee, WI 53204-1147
414-647-8200

FAMILY SUPPORT &
EMPOWERMENT PROGRAM
2030 West National Avenue
Milwaukee, WI 53204-1157
414-645-3300

ADMINISTRATION
2030 West National Avenue
Milwaukee, WI 53204-1157
414-672-5300 414-672-5340 (fax)
www.walkerspoint.org



Heartland Housing, Inc.
208 South LaSalle Street
Suite 1300
Chicago, IL 60604

· 312.660.1300
· 312.660.1500
heartlandalliance.org

March 18, 2015

Ms. Andi Elliott
Chief Executive Officer
Community Advocates, Inc.
728 North James Lovell Street
Milwaukee, WI 53233

RE: Milwaukee County WHEAP Program

Dear Andi:

On behalf of the Heartland Housing, I am writing to provide our support of Community Advocates' application to deliver the 2015 Energy Assistance program for Milwaukee County. Heartland Housing partnered with Community Advocates to develop the Maskani Apartments because of your leadership, technical knowledge and proven track record of successfully working with low income and other vulnerable populations. We are confident Community Advocates would bring this expertise to the County's Energy Assistance program.

Heartland Housing is in full support of Community Advocates application to provide WHEAP services for all of Milwaukee County. We further will assist in outreach efforts by distributing energy assistance information to the residents of our three affordable housing developments in Milwaukee.

Sincerely,


Michael Goldberg
Executive Director

~~the~~

03-06-2015

To whom this may concern,
Mrs. Pamela Bell, has outstanding
customer service, she is very
polite and extremely helpful, her
attitude was nothing less than
outstanding, I'd like to thank her
~~again~~ for the help on my application for
entry assistance. She is a wonderful
worker, you should be grateful to have
her on your wonderful team.
Thank you again,

Sincerely,
Mary Herman
Mary A. Herman
414-553-4513

Hello Tawanna,

I'm not sure if you remember me but earlier in January I came into the office with my daughter. We were standing just outside the office when you were sitting and said that I was somewhat flustered being that I was too late for that days appointments to apply for emergency assistance for my elderly mom. You kindly asked what I needed and then said you could do it for me. So I just wanted to thank you whole heartily for being so kind, taking that time to go above and beyond what probably is asked of you. I also wanted to let you know that the gesture was much appreciated and didn't go unnoticed. And thank you again for your professionalism for doing the process and saving me too the time

and resources of coming to the downtown area. Thank you again!

It means so much.



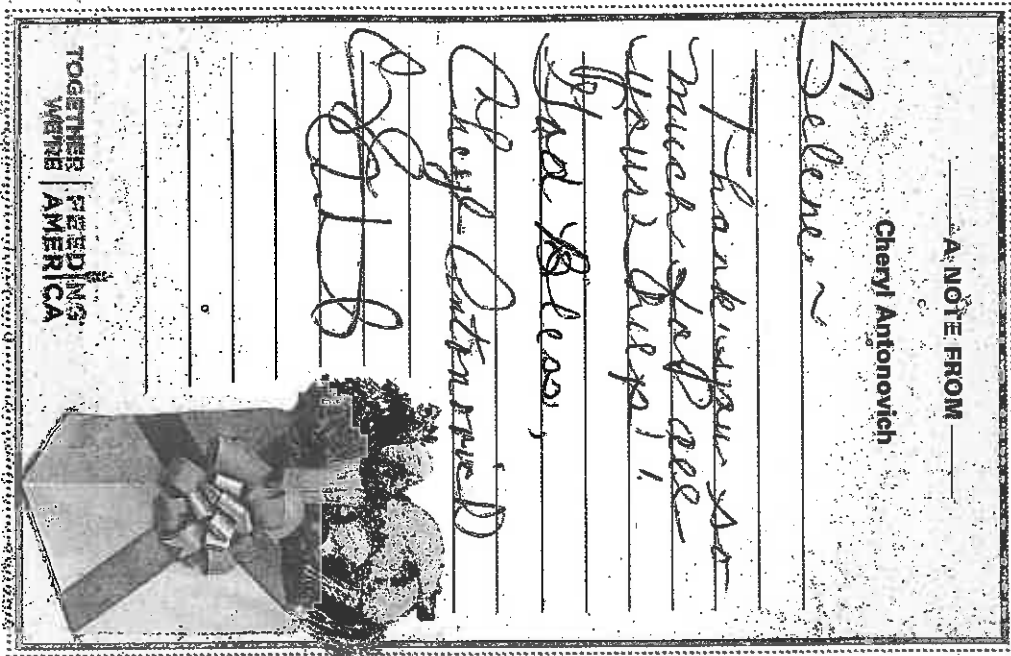
With Gratitude,

Dorothy Schuchel

Along with my mother,

Elvira Talaya





PAMELA,

2/4/15

I WANT TO Thank you for your help with my energy assistance. It is Appreciated more than I can say.

For all you do...

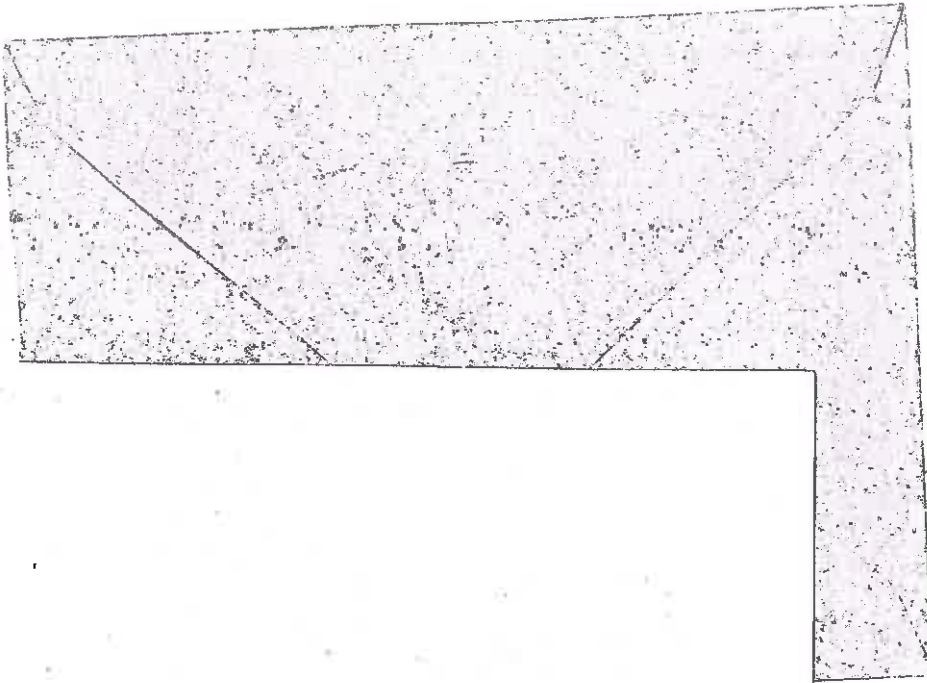
THANK YOU.

Have A Good year ahead of you.

Sincerely,

Debra K. Kiarang

FD# 968376



I am so very, very grateful
for your generous help.

Thank you so much for
such a wonderful blessing.

Sincerely,
Caroline



Mrs. Caroline Logan
Apt. 1
6971 N Tontonia Ave.
Milwaukee, WI 53209-2520

3/18/15

To whom this may concern:

I had a wonderful experience today. Pam came out and introduced herself and made everyone feel welcome and explained everything. She smiled and was very helpful. Corraune Miller confirmed that the staff is very caring.

Thank you
Community Advocates
Dawn Scott

Attachment D

Memorandum of Understanding

WHEREAS **Community Advocates, Inc.**, and the **Housing Authority City of Milwaukee** have come together to provide a public benefit to the Milwaukee community; and

WHEREAS the partners listed below have agreed to enter into a collaborative agreement to coordinate Energy Assistance enrollment services provided by the staff of **Community Advocates, Inc.**; and

WHEREAS the partners herein desire to enter into a Memorandum of Understanding setting forth the services and sites to be provided by the collaborative; and

WHEREAS the agreement prepared and approved by the collaborative through its partners is to be submitted to Milwaukee County Department of Health and Human Services, Management Services Division;

1) Description of Partner Agencies

Service Agency: Community Advocates, Inc. (CA) was established in September 1976 as a general advocacy agency serving low income residents of Milwaukee County. CA is the largest human needs advocacy agency in Wisconsin and is one of the few remaining community-based organizations of any kind that welcomes walk-in clients five days a week. The mission of Community Advocates is to *provide individuals and families with advocacy and services that meet their basic needs so they may live in dignity.*

Partner: The Housing Authority of the City of Milwaukee (HACM) has been a national leader in housing for over 60 years. HACM provides innovative affordable housing choices to over 10,000 Milwaukee families and works to assist them in achieving self-sufficiency through a wide range of economic, health and social services

The Housing Authority of the City of Milwaukee (HACM) was chartered in 1944 and is responsible for the construction, management, and provision of safe, affordable, and quality housing with services that enhance residents' self-sufficiency.

The Housing Authority manages over 4,000 units of low-income housing that are subsidized by the U.S. Department of Housing and Urban Development and administers over 5,700 Section 8 (Rent Assistance) vouchers. The Housing Authority also owns and manages over 1,000 units of affordable and market-rate rental housing.

II) Roles and Responsibilities

NOW, THEREFORE, it is hereby agreed by and between the partners as follows:

Community Advocates, Inc. commits to:

- Provide program coordination;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services;
- Provide staff, support services and all necessary equipment;
- Adhere to the schedule agreed upon by the MOU partners;
- Coordinate scheduled appointments; and
- Facilitate additional requirements and services required by program occupancy.

Housing Authority City of Milwaukee commits to:

- Assist in coordination of the project;
- Provide fully ADA accessible community room space that can accommodate Energy Assistance staff and clients;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services; and
- Post and promote availability of Energy Assistance enrollment services

III) Commitment to Partnership

- 1) The collaboration service area includes City of Milwaukee, Wisconsin.
- 2) The partners agree to collaborate, review program operations and site needs.
- 3) We, the undersigned, have read and agree with this MOU. Further, we have reviewed the proposed project and approve it.

By Andrea Elliott

Date 3/17/15

Andrea Elliott, Chief Executive Officer
Community Advocates, Inc.

By Antonio Pérez

Date 3/17/2015

Antonio Pérez, Executive Director
Housing Authority City of Milwaukee

**MEMORANDUM OF UNDERSTANDING
BETWEEN COMMUNITY ADVOCATES AND HUNGER TASK FORCE, INC.
FOR THE PROVISION OF ENERGY ASSISTANCE**

This agreement is between Community Advocates and Hunger Task Force, whereas Community Advocates will assist customers at the Hunger Task Force Robles Self-Service Center with applications for energy assistance.

Community Advocates agrees to:

1. Provide a staff person at the Robles Self-Service center, as needed, starting on March 12, 2015 to provide energy assistance on site.
2. Comply with all federal and state laws regarding the disclosure of confidential information.
3. Indemnify and hold harmless Hunger Task Force, its agents, employees and officers against any and all claims, demands, actions and causes of action and resulting liability, loss, damages, costs and expenses arising out of any application for energy assistance or disclosure of confidential records as a result of an application for energy assistance occurring at the Robles Center.

Hunger Task Force, Inc. agrees to:

1. Provide Hunger Task Force staff that will assist individuals maintain and continue FoodShare benefits, and provide referrals of nonparticipating but potentially eligible energy assistance clients to Community Advocates.
2. Provide internet service and printing capabilities to Community Advocates staff at the Robles Center for assisting clients with energy assistance.

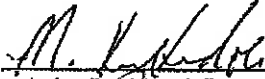
Termination

Both parties have the right to terminate this MOU at any time, for any reason, by giving notice of termination to the other party. Notice is sufficient either verbally or in writing.

Modification:

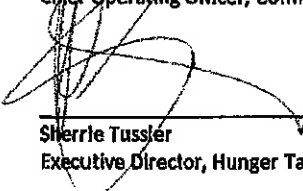
No modification, expansion, or amendment to this MOU will be of any force or effect unless in writing and signed by the parties hereto. This MOU is intended as the final expression of their agreement and as a complete and exclusive statement of its terms.

The undersigned agree to the terms and responsibilities set forth in this agreement.



Majudwella Kirkendoll
Chief Operating Officer, Community Advocates

3/16/15
Date



Sherrle Tussler
Executive Director, Hunger Task Force, Inc.

3/25/15
Date

Memorandum of Understanding

WHEREAS Community Advocates, Inc., and the Milwaukee County Housing Division have come together to provide a public benefit to the Milwaukee community; and

WHEREAS the partners listed below have agreed to enter into a collaborative agreement to coordinate Energy Assistance enrollment services provided by the staff of Community Advocates, Inc.; and

WHEREAS the partners herein desire to enter into a Memorandum of Understanding setting forth the services and sites to be provided by the collaborative; and

WHEREAS the agreement prepared and approved by the collaborative through its partners is to be submitted to Milwaukee County Department of Health and Human Services, Management Services Division;

1) Description of Partner Agencies

Service Agency: Community Advocates, Inc. (CA) was established in September 1976 as a general advocacy agency serving low income residents of Milwaukee County. CA is the largest human needs advocacy agency in Wisconsin and is one of the few remaining community-based organizations of any kind that welcomes walk-in clients five days a week. The mission of Community Advocates is to provide individuals and families with advocacy and services that meet their basic needs so they may live in dignity.

Partner: The Milwaukee County Housing Division strives to provide Milwaukee County residents in need with a safety net, decent and safe affordable housing, and a connection to opportunities improving the quality of life using available funding sources in the most equitable and efficient manner. Housing Division programs include:

Section 8 Rent Assistance

The Milwaukee County Housing Division administers the Section 8 Housing Choice Voucher Program, which is federally funded by the U.S. Department of Housing & Urban Development (HUD). This program is designed to accommodate very low-income families and individuals with rent assistance for decent, safe, and sanitary housing provided by private owners and rental agents. The Housing Division serves as the recognized public housing authority (PHA) for the Milwaukee County.

The Housing Division's Special Needs department focuses on the needs of homeless and disabled individuals by providing a variety of housing and supportive services programs.

Continuum of Care Rental Assistance

This program offers rental assistance to qualified individuals who are homeless and disabled.

Permanent Supportive Housing

The Housing Division assists individuals with mental health needs in finding and maintaining permanent housing.

II) Roles and Responsibilities

NOW, THEREFORE, it is hereby agreed by and between the partners as follows:

Community Advocates, Inc. commits to:

- Provide program coordination;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services;
- Provide staff, support services and all necessary equipment;
- Adhere to the schedule agreed upon by the MOU partners;
- Coordinate scheduled appointments; and
- Facilitate additional requirements and services required by program occupancy.

Milwaukee County Housing Division commits to:

- Assist in coordination of the project;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services; and
- Post and promote availability of Energy Assistance enrollment services

III) Commitment to Partnership

- 1) The collaboration service area includes **County of Milwaukee, Wisconsin**.
- 2) The partners agree to collaborate, review program operations and site needs.
- 3) We, the undersigned, have read and agree with this MOU. Further, we have reviewed the proposed project and approve it.

By Andrea Elliott

Date 3/18/15

Andrea Elliott, Chief Executive Officer
Community Advocates, inc.

By James Mathy

Date 3/18/15

James Mathy, Administrator
Housing Division, Department of Health & Human Services

Memorandum of Understanding

WHEREAS **Community Advocates, Inc.**, and the **Jomela Properties** have come together to provide a public benefit to the Milwaukee community; and

WHEREAS the partners listed below have agreed to enter into a collaborative agreement to coordinate Energy Assistance enrollment services provided by the staff of **Community Advocates, Inc.**; and

WHEREAS the partners herein desire to enter into a Memorandum of Understanding setting forth the services and sites to be provided by the collaborative; and

WHEREAS the agreement prepared and approved by the collaborative through its partners is to be submitted to Milwaukee County Department of Health and Human Services, Management Services Division;

1) Description of Partner Agencies

Service Agency: Community Advocates, Inc. (CA) was established in September 1976 as a general advocacy agency serving low income residents of Milwaukee County. CA is the largest human needs advocacy agency in Wisconsin and is one of the few remaining community-based organizations of any kind that welcomes walk-in clients five days a week. The mission of Community Advocates is to provide individuals and families with advocacy and services that meet their basic needs so they may live in dignity.

Partner: Jomela Properties is a locally owned and operated investment real estate firm that provides quality affordable rental housing to the Milwaukee community since 2005. Jomela Properties has over 1,400 apartment units throughout the County of Milwaukee, and is dedicated to partnership with nonprofits to assist underserved populations in finding appropriate, code-compliant housing at a reasonable price. Jomela Properties believes partnerships are essential to building successful communities, and seeks to expand Jomela's ability to help improve Milwaukee through collective business practices.

(Continued on the next page)

II) Roles and Responsibilities

NOW, THEREFORE, it is hereby agreed by and between the partners as follows:

Community Advocates, Inc. commits to:

- Provide program coordination;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services;
- Provide staff, support services and all necessary equipment;
- Adhere to the schedule agreed upon by the MOU partners;
- Coordinate scheduled appointments; and
- Facilitate additional requirements and services required by program occupancy.

Jomela Properties commits to:

- Assist in coordination of the project;
- Provide fully ADA accessible space that can accommodate Energy Assistance staff and clients;
- Collaborate on establishing days, times and location of Energy Assistance enrollment services; and
- Post and promote availability of Energy Assistance enrollment services

III) Commitment to Partnership

- 1) The collaboration service area includes **Milwaukee County, Wisconsin.**
- 2) The partners agree to collaborate, review program operations and site needs.
- 3) We, the undersigned, have read and agree with this MOU. Further, we have reviewed the proposed project and approve it.

By Andrea Elliott

Date 3/27/15

Andrea Elliott, Chief Executive Officer
Community Advocates, Inc.

By Amy Turim

Date 3/27/15

Amy Turim, Business Manager
Jomela Properties

Attachment E



Community Advocates - Energy Assistance

Community Advocates partners with Milwaukee County and the State of Wisconsin to provide assistance for heating costs, electricity costs, and energy crisis situations. The assistance is a one-time payment during the heating season (October 1-May 15). The funding pays a portion of the heating costs, but the payment is not intended to cover the entire cost of heating a residence. The amount of the energy assistance benefit varies depending on a variety of factors, including the household's size, income, and energy costs. In most cases the energy assistance benefit is paid directly to the household energy supplier.

Is my household eligible?

Eligibility for payment assistance is based upon your household income and the number of persons in your household. To see if you may be eligible enter your household income and members in household below.

Enter your household monthly income from all sources:

Enter the number living in your household:

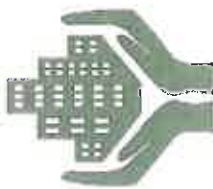
[Click for Results](#)

Community Advocates can help you apply for Energy Assistance for the 2011-2012 heating season. The earlier you apply the better. Don't wait until the last minute and risk utility disconnection. Click the link below now to make an appointment.

[Make an appointment with Community Advocates](#)

In these difficult economic times, and especially in Wisconsin, proactive efforts are important to stay current with energy bills. You may also qualify for Winter Weatherization help to improve your household's energy efficiency. For further information about help in Wisconsin, such as assistance in caulking, weather-stripping and insulation, click the link below.

[For further information about Energy assistance, click here](#)



**COMMUNITY
ADVOCATES**
Where Meeting Basic Needs
Inspires Hope

Welcome to Community Advocates - Please Sign In

The reason for my visit today is (click on one of the reasons below)

[I'm looking for Assistance with Utilities like Heating Bills](#)

[I'm looking for Assistance with Rent or other Housing problems](#)

[I'm returning with Documents](#)

[I'm here for some other reasons](#)

[You are here to see someone about Utilities](#)

Please enter your first and last name below

My First Name

Guest

My Last Name

Name

Click the Button to Finish

Finish



Schedule your Appointment

To confirm your appointment, complete this form, then click Save below

Date Time: 5/24/2011 9:30:00 AM
Where: You selected: 4906 West Fond Du Lac
Change your mind? To select a different place and time, click here

First Name: John
Last Name: Applicant
Street Address: 131 N Someplace St
Apt or Unit Numbers:
Zip Code: 53206
City/State: Milwaukee, Wisconsin
Telephone:

Want an email confirmation? japplicant@gmail.com
Enter your email address:

Click to Save your appointment



Making it better **now.**

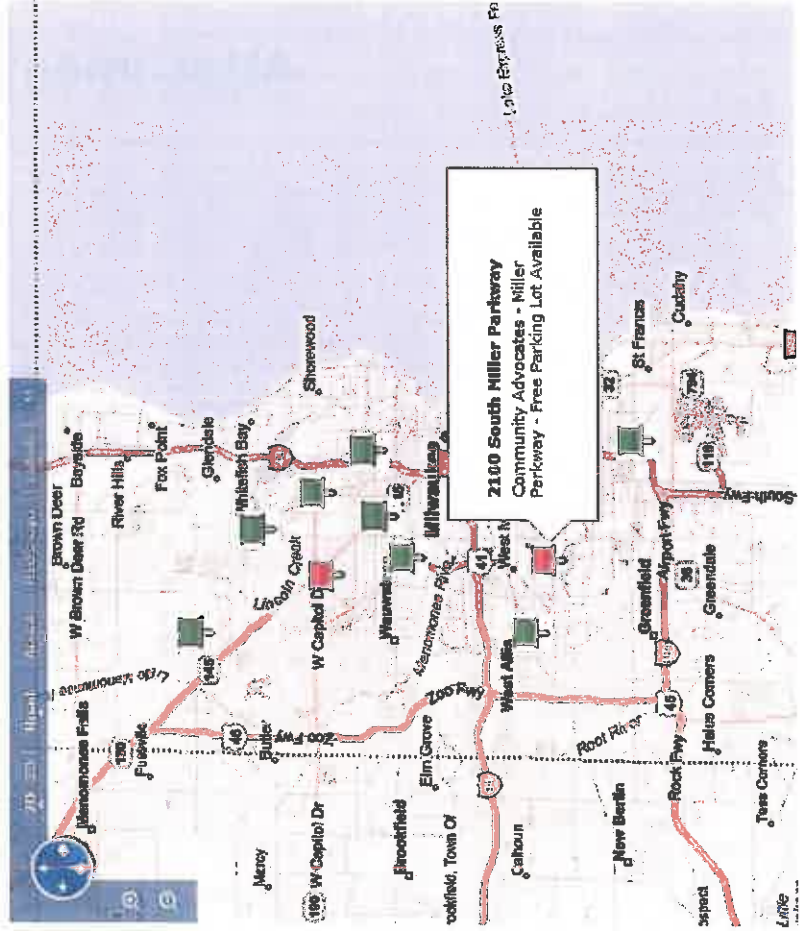


Remember to bring along these items with you:

- Wage receipts or other income receipts during the past 3 months
- Receipts for payment of mortgage or rent during the past 3 months
- Social Security Numbers of your household members
- Personal ID such as Driver's License

Community Advocates - Make an Appointment **Click a Site in the Map to see available appointments**
 We have 3 year around sites (red colored pin) and 9 seasonal sites (green colored pins) for you to choose from to make an appointment to apply for Energy Assistance

Year around sites have pins in this color **Seasonal sites have pins in this color**



You selected: 2100 South Miller Parkway
 We have 208 appointments to choose from during the next week at this site. Click on an appointment date/time in the list and a form will open where you can complete your appointment.

To see available appointments for other locations, click the location's pin in the map.

- Tuesday, May 24, 2011 8:30:00 AM
- Tuesday, May 24, 2011 9:00:00 AM
- Tuesday, May 24, 2011 9:30:00 AM
- Tuesday, May 24, 2011 10:00:00 AM
- Tuesday, May 24, 2011 10:30:00 AM
- Tuesday, May 24, 2011 11:00:00 AM
- Tuesday, May 24, 2011 11:30:00 AM
- Tuesday, May 24, 2011 12:00:00 PM
- Tuesday, May 24, 2011 12:30:00 PM
- Tuesday, May 24, 2011 1:00:00 PM
- Tuesday, May 24, 2011 1:30:00 PM
- Tuesday, May 24, 2011 2:00:00 PM
- Tuesday, May 24, 2011 2:30:00 PM
- Tuesday, May 24, 2011 3:00:00 PM

Attachment F

Energy Assistance* Is Now Available!



COMMUNITY ADVOCATES

At Community Advocates, you will receive prompt, courteous and professional customer service. You will not have to wait in line—we have a spacious waiting room which includes a children's area. The facility is fully accessible and free parking is available.

* Administered by the State of Wisconsin Home Energy Assistance Program.

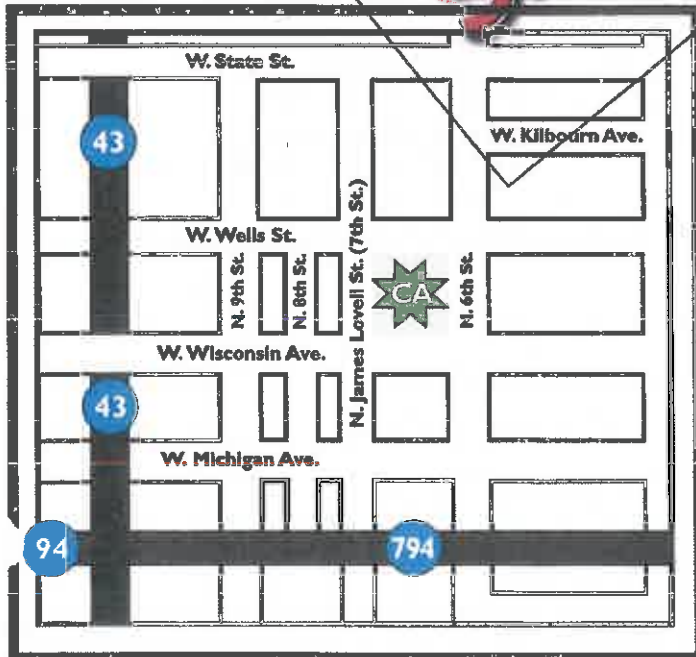
Energy Assistance* is available ...

- Monday-Friday, 7:30 a.m.-4:30 p.m.
- Tuesday and Thursday, 4:30-6 p.m.—By appointment only
- Saturday, 8 a.m.-noon—By appointment only

To schedule an appointment, call (414) 449-4777

Community Advocates • 728 N. James Lovell St. • Milwaukee, WI 53233 • Phone: (414) 449-4777 • communityadvocates.net

Community Advocates is located in downtown Milwaukee at 728 N. James Lovell St. (7th St. between W. Wisconsin Ave. and Wells St.)





COMMUNITY ADVOCATES

Where Meeting Basic Needs Inspires Hope

Energy Assistance* Site Locations

Administered by the State of Wisconsin
Home Energy Assistance Program

Community Advocates is offering Energy Assistance at the locations below. Please bring your current energy bill, the last three months of pay stubs and social security cards for everyone in your household. For more information call (414) 449-4777.

Community Advocates

728 N. James Lovell St., Milwaukee

- Monday-Friday—7:30 a.m.-6 p.m.
- Saturday—9 a.m.-1 p.m.

Community Advocates

4906 W. Fond Du Lac Ave., Milwaukee

- Monday-Friday—7:30 a.m.-6 p.m.
- Saturday—9 a.m.-1 p.m.

Miller Park Shops

2100 S. Miller Parkway, West Milwaukee

- Monday-Friday—7:30 a.m.-6 p.m.
- Saturday—9 a.m.-1 p.m.

Atkinson Library

1960 W. Atkinson Ave., Milwaukee

- Wednesday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.

Center Street Library

2727 W. Fond du Lac Ave., Milwaukee

- Wednesday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.

Martin Luther King Library

310 W. Locust St., Milwaukee

- Monday—4-8 p.m.
- Tuesday—4-8 p.m.

Mill Road Library

6431 N. 76th St., Milwaukee

- Tuesday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.

South Milwaukee Public Library

1907 10th Ave., South Milwaukee

- Wednesday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.

Tippecanoe Library

2412 S. Howell Ave., Milwaukee

- Tuesday—4-8 p.m.
- Wednesday—4-8 p.m.

Villard Avenue Library

3310 W. Villard Ave., Milwaukee

- Monday—4-8 p.m.
- Wednesday—4-8 p.m.

Washington Park Library

2121 N. Sherman Blvd., Milwaukee

- Thursday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.

West Allis Public Library

7421 W. National Ave., West Allis

- Monday—4-8 p.m.
- Saturday—10 a.m.-2 p.m.
(except for second Saturday of month)

Energy Assistance* Is Now Available at Community Advocates!

Community Advocates has moved into a new downtown facility at:

728 N. James Lovell St.
(7th St. between W. Wisconsin Ave.
and W. Wells St.)

At Community Advocates, clients will receive prompt, courteous and professional customer service. Clients will not have to wait in line—we have a spacious waiting room which includes a children's area. The facility is fully accessible and free parking is available.



Administered by the State of Wisconsin
Home Energy Assistance Program

Energy Assistance* is available

- Monday-Friday,
7:30 a.m.-4:30 p.m.
- Tuesday and Thursday,
4:30-6 p.m.—By appointment only
- Saturday, 8 a.m.-noon—
By appointment only

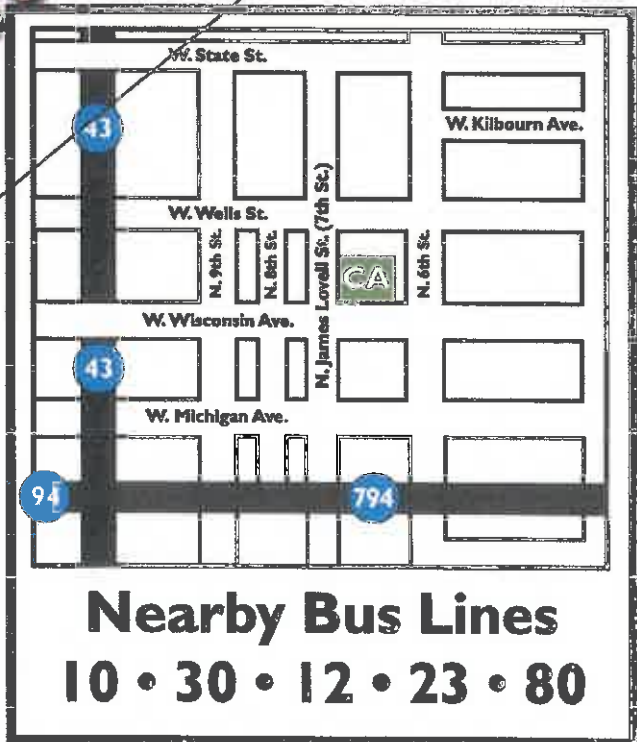
To schedule an appointment, call (414) 449-4777



COMMUNITY ADVOCATES

Where Meeting Basic Needs Inspires Hope

Community Advocates • 728 N. James Lovell St. • Milwaukee, WI 53233 • Phone: (414) 449-4777 • communityadvocates.net



County of Milwaukee Board of Supervisors Public Hearing



Attachment G



Site Plan
[Faded text describing the site plan details, including lot numbers and dimensions.]

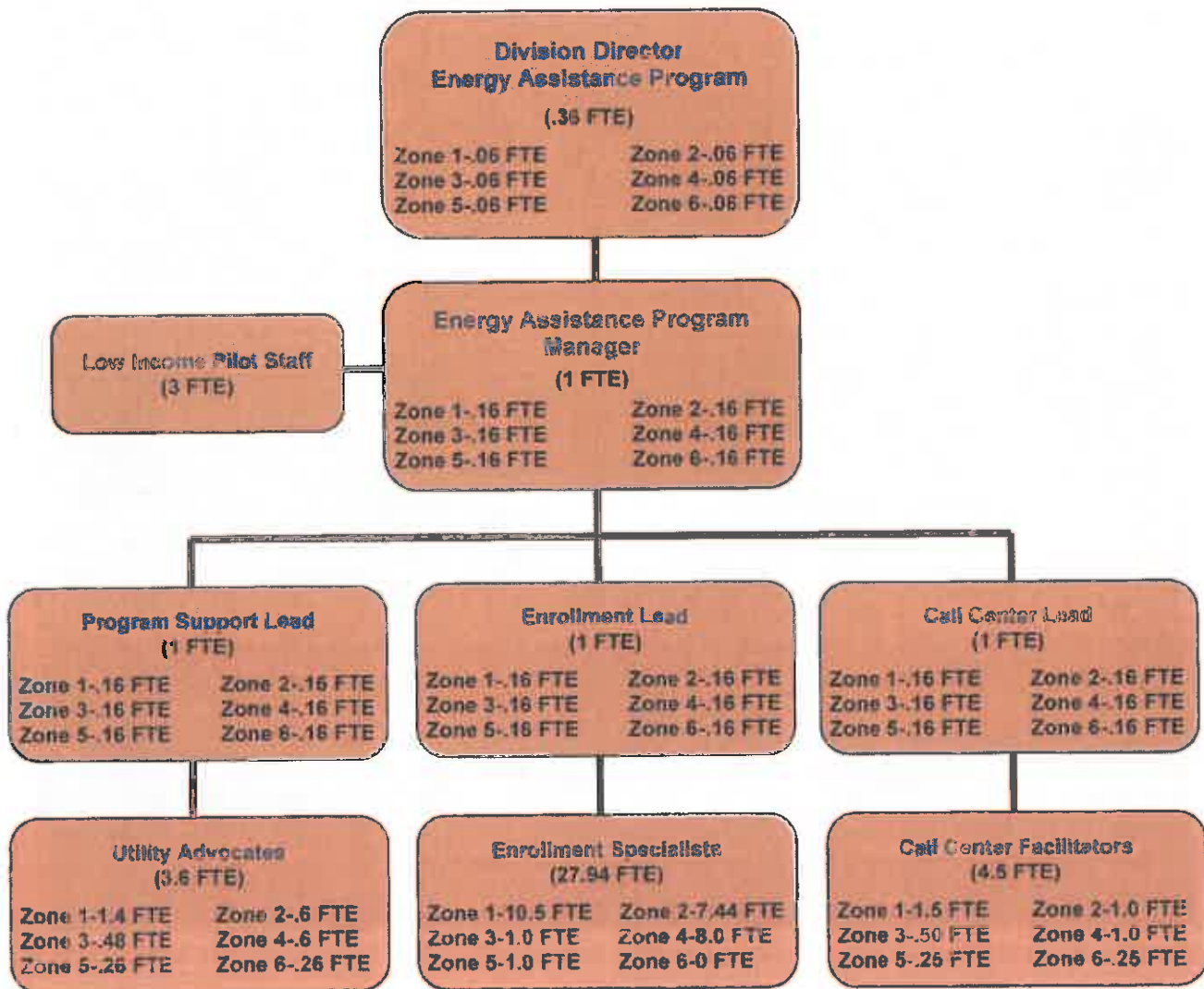
**Locations of Housing Authority of the City of Milwaukee's Owned and Managed Housing
Community Advocates Energy Assistance Sites**





Community Advocates, Inc. Energy Assistance Program

ORGANIZATIONAL CHART



PROGRAM ACCESSIBILITY

ITEM # 31

Agency's plan to serve clients with the following needs:

- With physical disabilities

Community Advocates' primary service and information/applications site is completely accessible for individuals who are physically disabled. Our main location at 728 N. James Lovell St. is wheelchair accessible with fully operational automatic doors, elevators, and wheelchair accessible service windows in the intake, interview, and service delivery areas on all three floors. Clients and staff can also access ADA compliant restrooms on all floors. Our reception area offers a "quiet" waiting area for clients whose anxiety or other mental health issues create a preference for personal privacy.

All other Community Advocates' partnering service sites are completely accessible for individuals who are physically disabled.

- With developmental disabilities

Arrangements for clients with developmental disabilities can be made to have personal care workers and/or family members attend meetings/trainings and/or otherwise help accommodate their needs.

- With hearing impairment

Upon request, Community Advocates will secure the services of a sign language interpreter from one of the following organizations Communication Link, Hearing Society of Milwaukee, IndependenceFirst, or the State Office for Hearing Impaired Persons for individuals with hearing impairments.

- With visual impairment

Building signage includes Braille. Individuals with visual impairments can typically be served without difficulty. However, upon request, Community Advocates will secure assistance from organizations whose mission is to serve individuals with visual impairments to jointly serve the individual to ensure their needs are met.

- Who are non- English speaking or have limited English proficiency

Community Advocates can accommodate non-English speakers or those with limited English proficiency by providing interpretation services of bi-lingual staff members. Currently, CA has several Spanish-speaking employees. Employees with bilingual capabilities serve as receptionists, answering initial telephone calls and greeting clients when they first arrive at the agency. In addition, bilingual advocacy staff members –

163 | Community Advocates, Inc.

along with managerial staff members – work at the main headquarters site and throughout the various sites and programs Community Advocates operates. If clients require interpretation services for another language, CA will secure professional interpretation services via telephone.

- Who require personal care assistance

Community Advocates' staff is able to provide limited personal care assistance. CA will provide referrals to other supportive personal care services or will assist in arranging personal care services for clients requiring ongoing personal care assistance.

List any other services enhancing program access, e.g. agency located near public transportation, etc.

Community Advocates central location downtown is easily accessible by public transportation, clients can combine CA visits with appointments at the courthouse, city hall, county services, and state and federal offices. Community Advocates' staff can also visit service recipients at other agencies and/or in home to facilitate service delivery and accessibility.

Staffing Pattern Justification

Community Advocates considered several items when developing the staffing pattern for Energy Assistance. Most importantly, we estimated the number of energy and crisis applications to be completed (based on the prior energy season applications completed) and secondly, we estimated the number of staff needed to complete those applications. In the charts attached we show the level of staffing for each category (crisis, outreach, and operations) as well.

Once the total pool of staff was determined, CA distributed staff according to their appropriate function and according the expected number of applications that correspond to that staff member's position by month. Based upon this assumption, we have developed a staffing pattern that reflects applications to be taken during a given month. As you will notice in the charts, we inflated last year's completed application numbers for August and September, to reflect our expectation that the fixed income list will be completed in a timely manner.

Our staffing pattern allows for timely appointments for all potential customers at all sites. CA is estimating that 33% of all applicants will go to zone 1, while 23% will go to zone 2. We also assumed based upon last year's numbers that zone 5 and zone 6 will have 6% of all applicants going to the sites in those areas. The staffing pattern reflects 25% of all applicants going to zone 4, however we anticipate that this will increase as awareness of the Robles Center availability is made known to the public. It is clear that a large portion of individuals living in zip 53204 will stay in their neighborhood near Robles for enrollment for energy assistance. The final 7% will have their applications completed in zone 3. Based upon these assumptions, we staffed those locations accordingly. (Please see graphs following).



The Proposed Energy Assistance Application chart is based upon applications completed in the 2013-14 Energy Assistance Year.



YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description* plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 1 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for this position (all employees, full and part-time), as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

*** Job Descriptions for all positions can be found following Item 33**

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 2 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 3 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for this position (all employees, full and part-time), as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 4 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 5 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Division Director – Zone 6 NO. OF STAFF: .06

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 1 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 2 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 3 NO. OF STAFF: 167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 4 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 5 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Manager – Zone 6 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 1 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 2 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 3 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for this position (all employees, full and part-time), as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 4 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 5 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Lead – Zone 6 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator- Zone 1 NO. OF STAFF: 1.5

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator- Zone 2 NO. OF STAFF: 1.00

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator-- Zone 3 NO. OF STAFF: .50

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator-- Zone 4 NO. OF STAFF: 1.00

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator-- Zone 5 NO. OF STAFF: .25

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Call Center Facilitator- Zone 6 NO. OF STAFF: .25

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 1 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for this position (all employees, full and part-time), as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 2 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 3 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 4 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 5 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Services Lead – Zone 6 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist Zone 1 NO. OF STAFF: 10.50

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for this position (all employees, full and part-time), as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist Zone 2 NO. OF STAFF: 7.44

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist Zone 3 NO. OF STAFF: 1.00

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist Zone 4 NO. OF STAFF: 8.00

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist Zone 5 NO. OF STAFF: 1.00

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

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YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Enrollment Specialist – Zone 6 NO. OF STAFF: 0

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-Q.A-Trainer – Zone 1 NO. OF STAFF: 167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-Q.A-Trainer – Zone 2 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-Q.A-Trainer – Zone 3 NO. OF STAFF: 167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-Q.A-Trainer – Zone 4 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-Q.A-Trainer – Zone 5 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

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PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Program Support Lead-QA-Trainer – Zone 6 NO. OF STAFF: .167

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate – Zone 1 NO. OF STAFF: 1.40

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate – Zone 2 NO. OF STAFF: .60

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate - Zone 3 NO. OF STAFF: 48

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0 / 0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate – Zone 4 NO. OF STAFF: .60

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate – Zone 5 NO. OF STAFF: .26

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0

YEAR 2015 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33 (cont.)

Indicate the number of staff necessary to achieve your proposal objectives, considering only direct staff, as indicated by codes 02 and 04 on Forms 2 and 2A. **Executive staff providing direct services to clients should be budgeted as either "Professional Salaries" or "Technical Salaries" on Budget Forms 2 and 2A.** Provide a job description plus necessary qualifications for each direct service position (sections A & B) (make additional copies as necessary). **Complete the attached roster (item 33) for current staff working in each program for which a proposal is being submitted.** If the position is unfilled at the time of proposal submission, indicate the vacancy and provide updated staffing form within 30 days of when position is filled. **For New Applicants for this program, submit calculations showing the agency-wide average of in-service/continuing education hours per direct service provider in the previous year.**

PROGRAM: Wisconsin Home Energy Assistance Program 2015 PROGRAM No. MSD001

POSITION TITLE: Utility Advocate – Zone 6 NO. OF STAFF: .26

Job Description for this position as required to meet the needs of the program specifications. Include qualifications needed to perform job (including certifications or licenses and experience requirements to perform the job). Attach separate sheet, if necessary.

Annual tuition reimbursement granted for this position: \$ 500 Per Year

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0 hrs.

Annual turnover for *this position (all employees, full and part-time)*, as measured by total number of separations (including voluntary and involuntary) from this position in the twelve months prior to completing this proposal divided by the total number of employees budgeted in this position for the twelve months prior to completing this proposal (show calculation): 0/0 = 0



COMMUNITY ADVOCATES
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**DIVISION DIRECTOR
Position Description**

LEADERSHIP

- Participate with the Executive Team in high level agency decision making
- Build a cohesive, productive division management team
- Establish and maintain a high level of staff morale while managing and improving performance and operating within organizational policy

OPERATIONAL PLANNING AND MANAGEMENT

- Work with the Chief Executive Officer & Chief Operating Officer to
 - Develop an divisional plan which incorporates goals and objectives that work towards the strategic direction of the organization
 - Ensure that the operation of the division meets the expectations of its clients, Board and Funders
- Oversee the efficient and effective day-to-day operation of the division
- Draft policies for the approval of the Executive Team and prepare procedures to implement the divisional policies; review existing policies on an annual basis and recommend changes as appropriate
- Ensure that personnel, client, donor and/or volunteer files are securely stored and privacy/confidentiality is maintained

PROGRAM PLANNING AND MANAGEMENT

- Work with the Chief Executive Officer & Chief Operating Officer to:
 - Ensure that the programs and services offered by the division contribute to the organization's mission.
 - Initiate and investigate new program ideas and funding sources
- Oversee the planning, implementation and evaluation of the division's programs and services including program and financial reporting to funding sources.
- Monitor the day-to-day delivery of the programs and services of the division to maintain or improve quality
- Oversee the planning, implementation, execution and evaluation of special projects

COMMUNITY RELATIONS/ADVOCACY

Work with the Chief Executive Officer & Chief Operating Officer to:

- Communicate with stakeholders to keep them informed of the work of the division and to identify changes in the community served by the division
- Establish good working relationships and collaborative arrangements with community groups, funders, politicians, and other organizations to help achieve the goals of the division

HUMAN RESOURCES PLANNING AND MANAGEMENT

- Work with the Chief Executive Officer & Chief Operating Officer to:
 - Determine staffing requirements for divisional management and program delivery
 - Hire and terminate department managers
- Administer human resources policies, procedures and practices consistently with all staff members
- Ensure the development of job descriptions for all division positions
- Establish a positive, healthy and safe work environment
- Recruit, interview and select staff that have the right technical and personal abilities to help further the division's mission
- Ensure that all staff receive an orientation to the division and that appropriate training is provided
- Monitor the performance of department managers on an on-going basis and conduct an annual performance review
- Coach and mentor staff as appropriate to improve performance
- Discipline staff when necessary using appropriate techniques; release staff when necessary using appropriate and legally defensible procedures

FINANCIAL PLANNING AND MANAGEMENT

- Work with the Chief Executive Officer & Chief Operating Officer to:
 - Prepare a comprehensive budget
- Participate in fundraising activities as appropriate
- Approve expenditures within the authority delegated by Executive/Associate Director and consistent with the division budget
- Ensure that accounting procedures are followed



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PROGRAM MANAGER

Position Description

OVERVIEW

Under the supervision of the Division Director, the Energy Assistance Program Manager is responsible for oversight of the Energy Assistance Program and the Energy Assistance Team.

The Energy Assistance Program Manager is responsible for ensuring that the program and all its services are achieving results as projected, and he/she coordinates all activities of the Program Support Lead/Quality Assurance - Trainer, the Enrollment Services Lead, and the Call Center Lead, in addition to the staff for which each Lead is responsible.

DUTIES & RESPONSIBILITIES

- Supervision of the Program leads, evaluating, providing direction, problem solving, and assessing and ensuring the development of management skills.
- Compile and analyze data to make recommendations for program operations.
- Conduct analysis of programs' effectiveness.
- Ensure all services are integrated.
- Ensure departmental and program goals are met.
- Ensure both internal and external reporting is completed accurately and on time.
- Contact community representatives and leaders of other programs to make presentations and solicit collaborative support.
- Act as liaison between the program, utilities, and state, county, and city departments.
- Attend meetings with State Contract Monitors and other community groups in order to exchange information and discuss problems.
- Coordinate outreach activity with other community-based organizations, churches, senior citizen housing sites, etc., ensuring all communities are served.
- Monitor program budgets.
- Conduct regular meetings with the Program Leads.
- Communicate with other Divisions and Departments and collect data that will assist in program and financial decision-making to improve the program.
- Complete other special tasks as assigned, including development of new initiatives.
- Carry out supervisory responsibilities in accordance with all organizational policies and applicable laws. These responsibilities include interviewing, hiring, and training employees;

planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

QUALIFICATIONS

- Bachelor's (B.A.) in Business or Marketing with emphasis on finance/accounting or the social services. At least 5 years' experience that demonstrates the skills, knowledge, and abilities to perform the above-listed job duties, or an equivalent combination of education and experience.
- Excellent communication skills, including ability to navigate a multicultural environment and to maintain the confidentiality of written or verbal information.
- Ability to write reports, business correspondence, written contracts, procedure manuals, and other documents as needed.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Ability to create and monitor budgets, interpret financial statements, and complete basic accounting and financial mathematical calculations.
- Superior organizational skills.
- Understanding of standard business and financial principles.
- Computer and internet fluency are required.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and work with a computer.



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CALL CENTER LEAD Position Description

OVERVIEW

Under the supervision of the Energy Assistance Program Manager, this position is responsible for managing the day-to-day operations of the Call Center team. The Call Center Lead will train and supervise all Call Center staff and perform related duties as assigned.

DUTIES & RESPONSIBILITIES

Under the supervision of the Energy Assistance Program Manager, the Call Center Lead will manage and supervise all Call Center activities, more specifically within the following duties:

- Supervise the Call Center staff (including hiring, training, coaching, and developing performance standards and measures).
- Monitor daily activity to ensure that all proper procedures and regulations are being followed. Review call records and schedules randomly on a weekly basis to identify and coordinate the correction of errors as needed.
- Resolve customer complaints by analyzing the situation, informing staff and clients about and/or enforcing program policies, documenting complaints, and taking appropriate action with staff as needed.
- Resolve technical customer and staff questions regarding energy-related programs (i.e., Keep Wisconsin Warm, Furnace Repair and Replacement Program) and inform clients and staff re: utility company procedures.
- Communicate with all staff regarding service issues, policy changes, new program information, meeting dates, site closings, etc.
- Keep up-to-date with the rules and regulations of the energy program in order to answer questions from staff and clients and make informed decisions regarding energy application and client eligibility.
- Attend weekly planning sessions with the Manager and other Leads during the summer to prepare for the new energy season, which includes determining/modifying sites if needed, devising new program forms, revising old forms, and putting together training packets for all staff.
- Coordinate outreach activity with other community-based organizations, churches, senior citizen housing sites, etc., ensuring all communities are served.
- Coordinate site schedules to ensure adequate staffing at each location.

- Assign home and phone visit requests, ensuring that the homebound and elderly households are properly serviced.
- Monitor and address crisis issues reported on the after-hour crisis line.
- Facilitate ongoing training sessions for staff and authorized representatives.
- Assist in developing and monitoring the program budget.
- Assist in developing informational material for the program.
- Assist in developing program procedures.
- Prepare and distribute monthly reports outlining program activity.
- Meet with staff on a regular basis to share information, plan work, establish priorities, and review work completed; review and set annual goals.
- Carry out supervisory responsibilities in accordance with the organization's policies and all applicable laws.

QUALIFICATIONS

- Bachelor's degree or equivalent, with three years related experience and/or training; or equivalent combination of education and experience.
- Excellent leadership and problem-solving skills.
- Excellent communication skills, including ability to navigate a multicultural environment and to maintain the confidentiality of written or verbal information.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Ability to complete basic mathematical computations.
- Computer and internet fluency are required.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and work with a computer.
- May require a valid driver's license, car, insurance, and good driving record for home visits or travel to alternative sites.



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CALL CENTER FACILITATOR Position Description

OVERVIEW

Under the supervision of the Call Center Lead, the Call Center Specialist is focused on customer service and will primarily take incoming calls and schedule appointments.

DUTIES & RESPONSIBILITIES

Under the supervision of the Call Center Lead and as a member of the Call Center team, the Call Center Specialist will answer phones and schedule appointments, more specifically within the following duties:

- Answer incoming phone calls and assist customers in making appointments with staff for energy assistance applications.
- Answer all customer questions completely and satisfactorily, or refer them to the sources where they can find answers.
- Provide the highest level of attentive customer service.
- Maintain call logs, appointment logs, and accurate records.
- Prepare all necessary forms and documentation.
- Complete and submit daily reporting form to Call Center Manager.

QUALIFICATIONS

- High school diploma or equivalent, with courses in business administration, accounting, computer science, or social work desirable.
- Computer and internet fluency are required.
- Ability to communicate clearly orally and in writing: must be able to present information clearly and respond to questions from clients, customers, and the general public.
- Must be 95% accurate in data entry skills.
- Flexibility to work some evening or Saturday hours.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit, talk on the phone, and enter data into a computer



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ENROLLMENT SERVICES LEAD Position Description

OVERVIEW

Under the supervision of the Energy Assistance Program Manager, this position is responsible for managing the day-to-day operations of the Processing team. The Enrollment/Outreach Services Lead will train and supervise all Processing Specialists and perform related duties as assigned.

DUTIES & RESPONSIBILITIES

Under the supervision of the Energy Assistance Program Manager, the Enrollment/Outreach Services Lead will manage and supervise all Enrollment activities, more specifically within the following duties:

- Supervise the staff (including hiring, training, coaching, and developing performance standards and measures).
- Assign home and phone visit requests, ensuring that the homebound and elderly households are properly serviced.
- Monitor daily activity to ensure that all proper procedures and regulations are being followed. Review applications randomly on a weekly basis to identify and coordinate the correction of errors as needed.
- Resolve customer complaints by analyzing the situation, informing staff and clients about and/or enforcing program policies, documenting complaints, and taking appropriate action with staff as needed.
- Resolve technical customer and staff questions regarding energy-related programs (i.e., Keep Wisconsin Warm, Furnace Repair and Replacement Program) and inform clients and staff re: utility company procedures.
- Communicate with all staff regarding service issues, policy changes, new program information, meeting dates, site closings, etc.
- Keep up-to-date with the rules and regulations of the energy program in order to answer questions from staff and clients and make informed decisions regarding energy application and client eligibility.
- Attend weekly planning sessions with the Energy Assistance Program Manager other Leads during the summer to prepare for the new energy season, which includes determining/modifying sites if needed, devising new program forms, revising old forms, and putting together training packets for all staff.

- Coordinate outreach activity with other community-based organizations, churches, senior citizen housing sites, etc., ensuring all communities are served.
- Coordinate site schedules to ensure adequate staffing at each location.
- Assign home and phone visit requests, ensuring that the homebound and elderly households are properly serviced.
- Monitor and address crisis issues reported on the after-hour crisis line.
- Facilitate ongoing training sessions for staff and authorized representatives.
- Assist in developing and monitoring the program budget.
- Assist in developing informational material for the program.
- Assist in developing program procedures.
- Prepare and distribute monthly reports outlining program activity.
- Meet with staff on a regular basis to share information, plan work, establish priorities, and review work completed; review and set annual goals.
- Carry out supervisory responsibilities in accordance with the organization's policies and all applicable laws.

QUALIFICATIONS

- Bachelor's degree or equivalent in social work or related area, with three years related experience and/or training; or equivalent combination of education and experience.
- Excellent leadership and problem-solving skills.
- Excellent communication skills, including ability to navigate a multicultural environment and to maintain the confidentiality of written or verbal information.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Ability to complete basic mathematical computations.
- Computer and internet fluency are required.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and work with a computer.
- May require a valid driver's license, car, insurance, and good driving record for home visits or travel to alternative sites.



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ENROLLMENT SPECIALIST Position Description

OVERVIEW

Under the supervision of the Enrollment Services Lead, conduct interviews of applicants seeking energy assistance and input application information directly into IT system. Perform related duties as assigned.

DUTIES & RESPONSIBILITIES

Under the supervision of the Enrollment Services Lead and as a member of the Enrollment team, the Enrollment Outreach Specialist will conduct interviews and process applications for energy assistance, more specifically within the following duties:

- Conduct interviews of individuals seeking Energy Assistance.
- Assist clients with the Energy Assistance application process.
- Verify client-provided information with external sources.
- Contact fuel vendors and other external sources to gather information which will help determine eligibility for assistance.
- Secure and verify data collected from applicants and all external sources.
- Refer additional social service-related client needs to the Enrollment Services Lead, for further assessment and more comprehensive services.
- Prepare all necessary forms and documentation.
- Accurately document information from clients' income verification paperwork, utility bills, and other verifying information collected, and input into WHEAP system maintaining an accuracy rate of at least 95%.
- Complete and submit daily reporting form to Enrollment Services Lead.

QUALIFICATIONS

- High school diploma or equivalent, with courses in business administration, accounting, computer science, or social work desirable.

- Two years of related experience which must have included some of the following: interviewing for the purpose of gathering and verifying necessary and accurate information for the completion of forms; securing financial information; performing basic mathematical computations; interpreting rules and regulations; reviewing social service-related forms and/or documents for completeness and accuracy; or equivalent combination of education and experience.
- Computer and internet fluency are required.
- Ability to communicate clearly orally and in writing: must be able to present information clearly and respond to questions from clients, customers, and the general public.
- Must be 95% accurate in data entry skills.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and enter data into a computer.
- May require a valid driver's license, car, insurance, and good driving record for home visits or travel to alternative sites.



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**PROGRAM SUPPORT LEAD
QUALITY ASSURANCE-TRAINER
Position Description**

OVERVIEW

Under the supervision of the Energy Assistance Program Manager, this position is responsible for managing the day-to-day operations of the Screening team. The Program Support Lead will train and supervise all Screeners and perform related duties as assigned.

DUTIES & RESPONSIBILITIES

Under the supervision of the Energy Assistance Program Manager, the Program Support Lead will manage and supervise all Screening activities, more specifically within the following duties:

- Supervise the Screening staff (including hiring, training, coaching, and developing performance standards and measures).
- Monitor daily activity to ensure that all proper procedures and regulations are being followed. Review case files randomly on a weekly basis to identify and coordinate the correction of errors as needed.
- Resolve customer complaints by analyzing the situation, informing staff and clients about and/or enforcing program policies, documenting complaints, and taking appropriate action with staff as needed.
- Resolve technical customer and staff questions regarding energy-related programs (i.e., Keep Wisconsin Warm, Furnace Repair and Replacement Program) and inform clients and staff re: utility company procedures.
- Communicate with all staff regarding service issues, policy changes, new program information, meeting dates, site closings, etc.
- Keep up-to-date with the rules and regulations of the energy program in order to answer questions from staff and clients and make informed decisions regarding energy application and client eligibility.
- Attend weekly planning sessions with the Energy Assistance Program Manager and other Leads during the summer to prepare for the new energy season, which includes determining/modifying sites if needed, devising new program forms, revising old forms, and putting together a training packet for all staff.

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- Coordinate site schedules to ensure adequate staffing at each location.
- Monitor and address crisis issues reported on the after-hour crisis line.
- Facilitate ongoing training sessions for staff and authorized representatives.
- Assist in developing and monitoring the program budget.
- Assist in developing informational material for the program.
- Assist in developing program procedures.
- Prepare and distribute monthly reports outlining program activity.
- Meet with staff on a regular basis to share information, plan work, establish priorities, and review work completed; review and set annual goals.
- Carry out supervisory responsibilities in accordance with the organization's policies and all applicable laws.

QUALIFICATIONS

- Bachelor's degree or equivalent in social work or related area, with three years related experience and/or training; or equivalent combination of education and experience.
- Excellent leadership and problem-solving skills.
- Excellent communication skills, including ability to navigate a multicultural environment and to maintain the confidentiality of written or verbal information.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Ability to complete basic mathematical computations.
- Computer and internet fluency are required.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and work with a computer.
- May require a valid driver's license, car, insurance, and good driving record for home visits or travel to alternative sites.



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**UTILITY ADVOCATE
CRISIS FURNACE
Position Description**

OVERVIEW

Under the supervision of the Enrollment Services Lead, provide case management services to low-income energy consumers. Perform related duties as assigned.

DUTIES & RESPONSIBILITIES

Under the supervision of the Enrollment Services Lead and as a member of the Enrollment team, the Utility Advocate will conduct interviews and process applications for energy assistance, more specifically within the following duties:

- Provide case management services to low-income energy consumers.
- Make group presentations at various community-based organizations.
- Provide advocacy services to low-income energy consumers.
- Perform outreach activities to low-income energy consumers.
- Perform home visits for homebound low-income energy consumers.
- Maintain case files for case management caseload.
- Prepare monthly reports on a timely basis.
- Other duties as assigned.
- Complete furnace referrals as needed

QUALIFICATIONS

- High school diploma or equivalent, with courses in business administration, accounting, computer science, or social work desirable.
- Two years of related experience which must have included some of the following: interviewing for the purpose of gathering and verifying necessary and accurate information for the completion of forms; securing financial information; performing basic mathematical computations; interpreting rules and regulations; reviewing social service-related forms and/or documents for completeness and accuracy; or equivalent combination of education and experience.
- Computer and internet fluency are required.

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- Ability to communicate clearly orally and in writing: must be able to present information clearly and respond to questions from clients, customers, and the general public.
- Must be 95% accurate in data entry skills.
- Flexibility to work some evening or Saturday hours.
- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential job duties: the employee is regularly required to sit and enter data into a computer.
- May require a valid driver's license, car, insurance, and good driving record for home visits or travel to alternative sites.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER *ITEM # 34*

Item 34 has been submitted electronically.

2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 1**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

2. Age Group:

	Number	Percent (%)	Prior year actual
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	958	3%	877
e. 21 - 35	10138	32%	9293
f. 36 - 60	12989	41%	11906
g. 61 & over	7603	24%	6970
TOTAL	31680	100%	29040

3. Sex:

a. Female	22810	72%	20909
b. Male	8870	28%	8131
TOTAL	31680	100%	29040

4. Ethnicity:

a. Asian or Pacific Islander	158	.5%	145
b. Black	20750	65.5%	19021
c. Hispanic	1584	5%	1452
d. American Indian or Alaskan Native	317	1%	290
e. White	8870	28%	8131
TOTAL	31680	100%	29040

5. Other:

a. Disabled individuals	9187	29%	8422
b. Not applicable	22493	71%	20618
TOTAL	31680	100%	29040

Date Submitted: **March 20, 2015**

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2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 2**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

	Number	Percent (%)	Prior year actual
2. Age Group:			
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	686	3%	625
e. 21 - 35	7322	32%	6665
f. 36 - 60	9381	41%	8539
g. 61 & over	5491	24%	4998
TOTAL	22880	100%	20827
			0
3. Sex:			
a. Female	16474	72%	14995
b. Male	6406	28%	5831
TOTAL	22880	100%	20827
4. Ethnicity:			
a. Asian or Pacific Islander	114	.5%	104
b. Black	14986	65.5%	13641
c. Hispanic	1144	5%	1041
d. American Indian or Alaskan Native	229	1%	208
e. White	6406	28%	5831
TOTAL	22880	100%	20827
5. Other:			
a. Disabled individuals	6635	29%	6040
b. Not applicable	16245	71%	14787
TOTAL	22880	100%	20827

Date Submitted: **March 20, 2015**

2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 3**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

2. Age Group:

	Number	Percent (%)	Prior year actual
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	211	3%	211
e. 21 - 35	2253	32%	2122
f. 36 - 60	2886	41%	2719
g. 61 & over	1690	24%	1591
TOTAL	7040	100%	6631

3. Sex:

a. Female	5069	72%	4774
b. Male	1971	28%	1857
TOTAL	7040	100%	6631

4. Ethnicity:

a. Asian or Pacific Islander	35	.5%	33
b. Black	4611	65.5%	4343
c. Hispanic	352	5%	352
d. American Indian or Alaskan Native	70	1%	70
e. White	1971	28%	1971
TOTAL	7040	100%	7040

5. Other:

a. Disabled individuals	2042	29%	2042
b. Not applicable	4998	71%	4998
TOTAL	7040	100%	7040

Date Submitted: **March 20, 2015**

2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 4**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

	Number	Percent (%)	Prior year actual
2. Age Group:			
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	739	3%	661
e. 21 - 35	7885	32%	7040
f. 36 - 60	10102	41%	9020
g. 61 & over	5914	24%	5280
TOTAL	24640	100%	22000
3. Sex:			
a. Female	17741	72%	15840
b. Male	6899	28%	6160
TOTAL	24640	100%	22000
4. Ethnicity:			
a. Asian or Pacific Islander	123	.5%	110
b. Black	16139	65.5%	14410
c. Hispanic	1232	5%	1100
d. American Indian or Alaskan Native	246	1%	220
e. White	6899	28%	6160
TOTAL	24640	100%	22000
5. Other:			
a. Disabled individuals	7146	29%	6380
b. Not applicable	17494	71%	15620
TOTAL	24640	100%	22000

Date Submitted: **March 20, 2015**

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2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 5**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

2. Age Group:

	Number	Percent (%)	Prior year actual
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	185	3%	162
e. 21 - 35	1971	32%	1723
f. 36 - 60	2526	41%	2208
g. 61 & over	1478	24%	1292
TOTAL	6160	100%	5384

3. Sex:

a. Female	4435	72%	3877
b. Male	1725	28%	1508
TOTAL	6160	100%	5384

4. Ethnicity:

a. Asian or Pacific Islander	31	.5%	27
b. Black	4035	65.5%	3527
c. Hispanic	308	5%	269
d. American Indian or Alaskan Native	62	1%	54
e. White	1725	28%	1508
TOTAL	6160	100%	5384

5. Other:

a. Disabled individuals	1786	29%	1531
b. Not applicable	4374	71%	3749
TOTAL	6160	100%	5280

Date Submitted: **March 20, 2015**

2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Community Advocates, Inc.
 Eligibility/Target Group Energy Assistance Customers
 Program Name WI Home Energy Assistance Program 2015 Program # **MSD001**
 Facility Name & Address Community Advocates Headquarters
728 N. James Lovell Street
Milwaukee, WI 53233

**CY 2015 Estimated
Zone # 6**

1. Unduplicated Count of Clients to be Served/Year (Form 1, Column 1). If your estimate differs from prior year actual, provide an explanation on a separate attached page:

	Number	Percent (%)	Prior year actual
2. Age Group:			
a. 0 - 2			
b. 3 - 11			
c. 12 - 17			
d. 18 - 20	175	3%	162
e. 21 - 35	1871	32%	1723
f. 36 - 60	2526	41%	2208
g. 61 & over	1478	24%	1292
TOTAL	6050	100%	5384
3. Sex:			
a. Female	4325	72%	3877
b. Male	1725	28%	1508
TOTAL	6160	100%	5384
4. Ethnicity:			
a. Asian or Pacific Islander	31	.5%	27
b. Black	4035	65.5%	3527
c. Hispanic	308	5%	269
d. American Indian or Alaskan Native	62	1%	54
e. White	1615	28%	1508
TOTAL	6160	100%	5384
5. Other:			
a. Disabled individuals	1786	29%	1531
b. Not applicable	4374	71%	3749
TOTAL	6160	100%	5280

Date Submitted: **March 20, 2015**

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
4906 W. Fond du Lac Ave Milwaukee, WI 53216
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison
 PROGRAM NAME ZONE 1
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *
 TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications Other:

ALL Proposers must provide the UNITS details even if their Programs are Cost reimburmments only

<u>COST CALCULATIONS:</u>	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="30,800.00"/>	<input type="text" value="\$ 733,414"/>	<input type="text" value="\$ 23.81"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="30,800.00"/>	<input type="text" value="\$ 733,414"/>	<input type="text" value="\$ 23.81"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

If you have a Federally approved indirect rate, enter it here as %

FORM 5 TOTAL AGENCY ANTICIPATED EXPENSES

AGENCY: N. Community Advocates, Inc.

Control Acct. No.	(A) Expenditure Description	(B)		(C)		(D)	(E)					(F)	(G)
		2013 Actual	2014 Gross Budget	2014 Gross Budget	2015 Gross Budget	2015 Gross Budget	ZONE 1 (program) Gross Budget	ZONE 2 (program) Gross Budget	ZONE 3 (program) Gross Budget	ZONE 4 (program) Gross Budget	ZONE 5 (program) Gross Budget	Indirect Costs Gross Budget*	Other Contracts Programs & Functions**
7000	Salaries	3,294,700	4,252,772	4,252,772	4,289,666	4,289,666	317,853	264,959	151,089	258,689	126,639	346,742	2,765,885
7100	Employee Health & Retirement Benefits	473,084	385,252	385,252	427,571	427,571	39,743	39,709	18,889	29,339	16,082	22,519	244,100
7200	Payroll Taxes	699,329	616,468	616,468	533,909	533,909	38,924	32,190	18,357	32,646	15,630	43,043	335,669
8000	Professional Fees	240,975	574,908	574,908	464,468	464,468						105,590	358,875
8100	Supplies	283,782	138,102	138,102	118,519	118,519	12,294	7,990	4,277	7,990	3,447	2,371	77,003
8200	Telephone	117,053	87,948	87,948	85,225	85,225	9,634	6,780	1,637	9,424	1,022	13,611	48,155
8300	Postage and Shipping	32,715	35,000	35,000	20,000	20,000	4,970	3,424	1,187	3,424	1,022	3,000	1
8400	Occupancy	945,282	1,096,445	1,096,445	1,013,368	1,013,368	41,535	21,398	8,438	31,611	8,862	7,146	773,020
8500	Rental, Maintenance & Depreciation of Equipment	823,287	230,492	230,492	219,950	219,950	9,840	5,849	2,374	6,849	2,044	2,044	166,539
8600	Printing and Publications	40,731	28,000	28,000	19,000	19,000	4,032	3,806	973	2,806	838	2,526	4,181
8700	Travel	112,871	110,924	110,924	85,461	85,461	1,640	1,141	396	1,141	340	2,500	77,963
8800	Conferences, Conventions, Meetings	76,316	109,916	109,916	41,291	41,291	666	456	138	457	136	6,000	33,322
8900	Specific Assistance to Individuals	1,519,920	1,209,209	1,209,209	1,189,091	1,189,091							1,188,091
9000	Membership Dues	23,102	19,009	19,009	18,993	18,993	820	570	198	571	170	10,639	5,835
9100	Awards and Grants												
9200	Allocated Costs (from Indirect Cost Allocation Plan, if applicable) *						56,432	47,032	24,821	41,638	21,636	25,934	691,000
9300	Client Transportation												
9400	Miscellaneous	106,984	102,718	102,718	66,500	66,500						3,000	63,500
9500	Depreciation or Amortization												
9600	Allocations to Agencies, Payments to affiliated Organizations	3,227,560	3,099,048	3,099,048	2,715,508	2,715,508							2,715,500
	TOTAL EXPENSES	14,526,021	12,200,719	12,200,719	11,408,113	11,408,113	538,053	425,224	234,784	435,904	201,068	223,069	9,249,010
	PROFIT FACTOR												
	TOTAL EXPENSES INCLUDING PROFIT	14,526,021	12,200,719	12,200,719	11,408,113	11,408,113	538,053	425,224	234,784	435,904	201,068	223,069	9,249,010
	TOTAL NON-DHS CONTRACT REVENUE BROUGHT FWD				2,959,103	2,959,103	538,053	425,224	234,784	435,904	201,068	223,069	9,249,010
	TOTAL DHS REQUEST	14,526,021	12,200,719	12,200,719	2,959,103	2,959,103	538,053	425,224	234,784	435,904	201,068	223,069	9,249,010

Rev. 6/14 Date (Initial): April 24, 2015 Date (Final):

* Control Account Number 9200, Allocated Costs, column F, should be entered as a negative number in order for column D to cross-foot to zero.
 ** Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Programs funded by Site must include separate form for each Site.

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Division

PROGRAM NAME ZONE 2
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK 5.00
 NUMBER HOURS PROGRAM OPERATES PER DAY 8.00
 NUMBER OF CASES TO BE SERVED PER YEAR * 22,000.00

ALL Proposers must provide the UNIT's details even if their Programs are Cost reimbursement only

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Other Applications
 Other: (Specify)

COST CALCULATIONS:	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<u>22,000.00</u>	<u>\$ 511,168</u>	<u>\$ 23.23</u>
2. Other Funding Source's Units and Costs	<u>0.00</u>	<u>\$ -</u>	<u>\$ -</u>
3. Total	<u>22,000.00</u>	<u>\$ 511,168</u>	<u>\$ 23.23</u>
4. 2014 Budgeted Units and Costs	<u>0.00</u>	<u>\$ -</u>	<u>\$ -</u>
5. 2013 Actual Units and Costs	<u>0.00</u>	<u>\$ -</u>	<u>\$ -</u>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : March 26, 2015 DATE (FINAL): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison
 PROGRAM NAME ZONE 3
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *

ALL Proposers must provide the UNITS details even if their Programs are Cost reimbursements only

TYPE OF UNIT: Mouth / Day/ Hour/1/4 Hour/other: Applications
 Other: (Specify)

COST CALCULATIONS:	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="7,040.00"/>	\$ <input type="text" value="155,573"/>	\$ <input type="text" value="22.10"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
3. Total	<input type="text" value="7,040.00"/>	\$ <input type="text" value="155,573"/>	\$ <input type="text" value="22.10"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14

DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 IE & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison
 PROGRAM NAME ZONE 6
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *
 TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications

ALL Proposers must provide the UNIT's details even if their Programs are Cost reimbursements only

COST CALCULATIONS:	TOTAL	PROGRAM	COST
	PROGRAM	COST BY	PER
	UNITS	FUNDING	UNIT
	(A)	(B)	(C)
1. DHHS Program's Units and Costs	<input type="text" value="6,160.00"/>	\$ <input type="text" value="133,348"/>	\$ <input type="text" value="21.65"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
3. Total	<input type="text" value="6,160.00"/>	\$ <input type="text" value="133,348"/>	\$ <input type="text" value="21.65"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	\$ <input type="text" value="-"/>	\$ <input type="text" value="-"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 ME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison

PROGRAM NAME ZONE 5
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *

ALL Proposers must provide the UNIT's details even if their Programs are Cost reimbursements only

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications
 Other: (Specify)

<u>COST CALCULATIONS:</u>	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="6,160.00"/>	<input type="text" value="\$ 133,348"/>	<input type="text" value="\$ 21.65"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="6,160.00"/>	<input type="text" value="\$ 133,348"/>	<input type="text" value="\$ 21.65"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14

DATE (INITIAL) : March 26, 2015 DATE (FINAL): _____

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Advocates, Inc.
 NAME & ADDRESS OF PROGRAM SITE Community Advocates, Inc.
728 N. James Lovell Milwaukee, WI 53233
 AGENCY FEDERAL TAX ID NUMBER 39-1249426
 DHHS DIVISION Management Services Divison
 PROGRAM NAME ZONE 4
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. MSD 001

ALL Proposers must provide the UNITS details even if their Programs are Cost reimbursements only

NUMBER OF DAYS PROGRAM OPERATES PER WEEK
 NUMBER HOURS PROGRAM OPERATES PER DAY
 NUMBER OF CASES TO BE SERVED PER YEAR *

TYPE OF UNIT: Month / Day/ Hour/1/4 Hour/other Applications
 Other: (Specify)

COST CALCULATIONS:	TOTAL PROGRAM UNITS (A)	PROGRAM COST BY FUNDING SOURCE (B)	COST PER UNIT (C)
1. DHHS Program's Units and Costs	<input type="text" value="24,640.00"/>	<input type="text" value="\$ 533,392"/>	<input type="text" value="\$ 21.65"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
3. Total	<input type="text" value="24,640.00"/>	<input type="text" value="\$ 533,392"/>	<input type="text" value="\$ 21.65"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>
5. 2013 Actual Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ -"/>	<input type="text" value="\$ -"/>

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART
 A Form 1 must be completed for each site (address) if the agency is reimbursed by site.

Rev. 6/14 DATE (INITIAL) : _____ March 26, 2015 DATE (FINAL): _____

FORM 5 TOTAL AGENCY ANTICIPATED EXPENSES

AGENCY N Community Advocates, Inc.

If you have a Federally approved indirect rate enter it here as %

Control Acct. No.	(A) Expenditure Description	(B) 2013 Actual	(C) 2014 Gross Budget	(D) 2015 Gross Budget	(E1) ZONE 1 (program) Gross Budget	(E2) ZONE 2 (program) Gross Budget	(E3) ZONE 3 (program) Gross Budget	(E4) ZONE 4 (program) Gross Budget	(E5) ZONE 5 (program) Gross Budget	(E6) ZONE 6 (program) Gross Budget	(F) Indirect Costs Gross Budget*	(G) Other Contracts Programs & Functions**
7000	Salaries	5,394,700	4,275,272	4,469,966	452,143	316,139	93,639	334,139	80,639	80,639	346,742	2,765,885
7100	Employee Health & Retirement Benefits	473,084	381,252	444,885	58,064	39,816	12,029	42,017	10,359	10,359	32,519	239,791
7200	Payroll Taxes	690,399	620,663	543,629	54,935	38,411	11,377	40,598	9,798	9,798	43,043	335,669
8000	Professional Fees	940,975	571,903	464,468	-	-	-	-	-	-	105,593	358,875
8100	Supplies	283,762	139,102	118,819	12,294	7,990	4,277	7,990	3,447	3,447	2,371	77,003
8200	Telephone	117,633	87,948	95,225	9,634	6,720	1,697	3,424	1,022	1,022	13,611	48,155
8300	Postage and Shipping	32,715	35,000	20,000	4,920	3,424	1,187	3,424	1,022	1,022	5,000	1
8400	Occupancy	945,282	1,095,645	1,032,559	45,708	31,813	11,028	31,811	9,496	9,496	120,178	773,038
8500	Rental, Maintenance & Depreciation of Equipment	523,287	250,492	220,959	9,840	6,849	2,374	6,849	2,044	2,044	24,011	166,939
8600	Printing and Publications	40,731	24,000	19,000	4,032	2,806	973	2,806	838	838	3,526	4,181
8700	Travel	118,871	116,524	85,461	1,640	1,141	396	1,141	340	340	2,500	77,963
8800	Conferences, Conventions, Meetings	762,216	109,926	41,291	656	456	158	457	136	136	6,000	33,292
8900	Specific Assistance to Individuals	1,519,820	1,206,288	1,188,091	-	-	-	-	-	-	-	1,188,091
9000	Membership Dues	22,102	14,000	18,993	820	570	198	571	170	170	10,629	5,838
9100	Awards and Grants	-	-	-	-	-	-	-	-	-	-	-
9200	Allocated Costs (From Indirect Cost Allocation Plan, if applicable) *	-	-	-	78,707	55,032	16,300	58,165	14,037	14,037	(717,253)	481,473
9300	Client Transportation	-	-	-	-	-	-	-	-	-	-	-
9400	Miscellaneous	186,884	166,718	66,990	-	-	-	-	-	-	3,000	63,590
9500	Depreciation or Amortization	-	-	-	-	-	-	-	-	-	-	-
9600	Allocations to Agencies, Payments to Affiliated Organizations	3,227,560	3,699,048	2,715,590	-	-	-	-	-	-	-	2,715,590
	TOTAL EXPENSES	14,526,421	12,208,720	11,535,528	793,414	511,168	155,573	533,992	133,348	133,348	0	9,335,085
	PROFIT FACTOR	-	-	-	-	-	-	-	-	-	-	-
	TOTAL EXPENSES INCLUDING PROFIT	14,526,421	12,208,720	11,535,528	793,414	511,168	155,573	533,992	133,348	133,348	0	9,335,085
	TOTAL NON-DHS CONTRACT REVENUE BROUGHT FWD	-	-	-	-	-	-	-	-	-	-	-
	TOTAL DHS REQUEST	14,526,421	12,208,720	11,535,528	793,414	511,168	155,573	533,992	133,348	133,348	0	9,335,085

Rev. 6/14

Date (Initial):
Date (Final):

* Control Account Number 9200, Allocated Costs, column F, should be entered as a negative number in order for column D to cross-foot to zero.

** Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

FORM 5A TOTAL AGENCY ANTICIPATED REVENUE

AGENCY NAME: Community Advocates, Inc.

Control Acct. No.	(A) Revenue	(B) 2013 Actual	(C) 2014 Revenue Budget	(D) 2015 Revenue Budget	(E1) ZONE 1 (program) Revenue Budget	(E2) ZONE 2 (program) Revenue Budget	(E3) ZONE 3 (program) Revenue Budget	(E4) ZONE 4 (program) Revenue Budget	(E5) ZONE 5 (program) Revenue Budget	(E6) ZONE 6 (program) Revenue Budget	(F) Indirect Costs Revenue Budget	(G) Other Contracts Prov. & Runn. Revenue Budget
4000	Contributions and Donations	270,763	300,000	185,000	-	-	-	-	-	-	-	185,000
4100	Contributions to Building Fund	-	-	-	-	-	-	-	-	-	-	-
4200	Special Events	-	-	-	-	-	-	-	-	-	-	-
4300	Legacies and Bequests	-	-	-	-	-	-	-	-	-	-	-
4500	Collected through Local Member Units	-	-	-	-	-	-	-	-	-	-	-
4600	Contributed by Associated Organizations	-	-	-	-	-	-	-	-	-	-	-
4700	Allocated by Federated Fund Raising Organizations	-	-	-	-	-	-	-	-	-	-	-
4800	Allocated by Unassociated and Non-Federated Fund Raising Organizations	281,222	365,353	473,425	-	-	-	-	-	-	-	473,425
5100	Other Government Purchase of Service (DO NOT INCLUDE ANY REQUESTS FROM DRHS)	-	-	-	-	-	-	-	-	-	-	-
5200	Grants from Other Governmental Agencies (DO NOT INCLUDE ANY REQUESTS FROM DRHS)	12,275,766	11,834,367	8,411,642	-	-	-	-	-	-	-	8,411,642
5300	Revenues from FMO and PPO	-	-	-	-	-	-	-	-	-	-	-
6000	Membership Dues	-	-	-	-	-	-	-	-	-	-	-
6100	Assessments and Dues-Local Member Units	-	-	-	-	-	-	-	-	-	-	-
6200	Program Service Fees-Other	-	-	265,016	-	-	-	-	-	-	-	265,016
6300	Intra-Agency Sales of Supplies and Services	-	-	-	-	-	-	-	-	-	-	-
6400	Revenues from Disposal of Assets	-	-	-	-	-	-	-	-	-	-	-
6500	Investment Income	59,131	-	-	-	-	-	-	-	-	-	-
6600	Gains (and Losses) on Investment Transactions	-	-	-	-	-	-	-	-	-	-	-
6700	Miscellaneous Revenues	287,296	-	-	-	-	-	-	-	-	-	-
	TOTAL NON-DRHS CONTRACT REVENUE	13,477,117	12,200,720	9,335,085	733,414	511,168	155,573	533,992	133,348	133,348	-	9,335,085
	DRHS CONTRACT REQUEST				733,414	511,168	155,573	533,992	133,348	133,348	-	-
	TOTAL REVENUE	13,477,117	12,200,720	11,538,328	733,414	511,168	155,573	533,992	133,348	133,348	-	9,335,085

Date (Initial): _____
Date (Print): March 28, 2015

* Use Other Contracts Programs & Functions, column G for all non-Milwaukee County programs or functions

Form 6 INDIRECT COST ALLOCATION PLAN
Summary Sheet

- 1 Agency Name: Community Advocates, Inc.
- 2 Disability/Target Group: Management Services Division
 (Use additional copies of this form as needed.)

A	B	C	Form 6D	Form 6E	Form 6F	Form 6G	Form 6H	I
Account Number	Indirect Cost Account Description	Total Agency Indirect Costs Σ col (D) to col (H)	Direct Salaries Allocation	FTE Allocation	Square Footage Allocation	Direct Cost Allocation	Other Allocation	Unallowable Indirect Costs**
7000	Salaries	346,742	346,742					\$ -
7100	Employee Health & Retirement Ben.	32,519	32,519					\$ -
7200	Payroll Taxes	43,043	43,043					\$ -
8000	Professional Fees	103,593	103,593					\$ -
8100	Supplies	2,371	2,371					\$ -
8200	Telephone	13,611	13,611					\$ -
8300	Postage & Shipping	5,000	5,000					\$ -
8400	Occupancy	120,178	120,178					\$ -
8500	Rental & Maintenance of Equip.	24,011	24,011					\$ -
8600	Printing & Publications	2,526	2,526					\$ -
8700	Employee Travel	2,500	2,500					\$ -
8800	Conferences, Conventions, Meetings	6,000	6,000					\$ -
8900	Specific Assistance to Individuals	-	-					\$ -
9000	Membership Dues	10,659	10,659					\$ -
9100	Awards & Grants	-	-					\$ -
9300	Client Transportation	-	-					\$ -
9400	Other Miscellaneous (Specify)	3,000	3,000					\$ -
9500	Depreciation or Amortization	-	-					\$ -
9600	Allocations to Agencies	-	-					\$ -
	Interest							\$ -
	Bad Debt							\$ -
	TOTAL INDIRECT COSTS *	\$ 717,753	\$ 717,753	\$ -	\$ -	\$ -	\$ -	\$ -

* Individual line entries for Total Agency Indirect Costs (column C) should be entered on the corresponding respective line on Form 5, column F.

** Enter Agency Indirect Costs which may not be allocated to Milwaukee County Programs under Federal & State Cost Principles

As part of program budgeting, agencies which are contracted to provide more than one program are required to assign indirect costs to each program under contract. Describe the formula/method used to distribute indirect costs to programs.

Rev. 6/14

Date (Initial):

March 26, 2015

Date (Final):

Form 6D INDIRECT COST ALLOCATION PLAN
Allocation Basis: Direct Salaries

1. Agency Name: Community Advocates, Inc.

2. Disability/Target Group: Management Services Division
 (Use additional copies of this form as needed.)

A	B	C	(E1)	(E2)	(E3)	(E4)	(E5)	(E6)	L
Account Number	Indirect Cost Account Description	Allowable Total Direct Salaries Allocation *	ZONE 1 (program)	ZONE 2 (program)	ZONE 3 (program)	ZONE 4 (program)	ZONE 5 (program)	ZONE 6 (program)	Other Contracts Programs & Functions
7000	Salaries	346,742							
7100	Employee Health & Retirement Ben.	32,519							
7200	Payroll Taxes	43,043							
8000	Professional Fees	105,593							
8100	Supplies	2,371							
8200	Telephone	13,611							
8300	Postage & Shipping	5,000							
8400	Occupancy	120,178							
8500	Rental & Maintenance of Equip.	24,011							
8600	Printing & Publications	2,526							
8700	Employee Travel	2,500							
8800	Conferences, Conventions, Meetings	6,000							
8900	Specific Assistance to Individuals	-							
9000	Membership Dues	10,659							
9100	Awards & Grants	-							
9300	Client Transportation	-							
9400	Other Miscellaneous (Specify)	3,000							
9500	Depreciation or Amortization	-							
9600	Allocations to Agencies	-							
	Interest	-							
	Bad Debt	-							
	TOTAL INDIRECT COSTS **	\$ 717,753	78,707	55,032	16,300	58,165	14,037	14,037	481,473
	TOTAL DIRECT SALARIES	\$ 4,123,224	452,143	316,139	93,639	334,139	80,639	80,639	2,765,885

* Individual line entries for Total Direct Salaries Allocation (column C) come from the Indirect Cost Summary Form 6 (column D).

** Totals for each Program (columns D through K) should be entered in Control Account Number 9200, Allocated Costs on Form 3 (column C) for each Milwaukee County program. All other non-Milwaukee County contracts, programs & functions should be entered in column L, Total Indirect Costs, and carried to Form 5, column G.

As part of program budgeting, agencies which are contracted to provide more than one program are required to assign indirect costs to each program under contract. Describe the formula/method used to distribute indirect costs to programs.

Date (Initial):

March 26, 2015

Date (Final):

Item # 28 Form 6

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 298

A	B	C	D	E	F	G	H
Inputs	Processes/Program Activities	Outputs	Expected Outcomes	Indicators	Projected level of achievement	For evaluation report Actual level of Achievement Description of changes	
<p><i>(All inputs apply to at least one or more activities.)</i></p> <p>Experienced Staff</p> <p>Eligible Clients</p> <p>All direct/indirect costs</p> <p>Program publicity</p> <p>Transportation information assistance</p>	<p>Public information</p> <ul style="list-style-type: none"> Public Service messaging (radio, spots, bus sides, etc.) will be used to publicize energy assistance program Informational flyers will be distributed and available at public buildings, offices and CBOs throughout Milwaukee County All information will include WHEAP identification, emergency and year-round contact numbers Information will accommodate LEP needs Staff facilitate transportation services 	<p>100,000 Milwaukeeans will hear/view public information about energy assistance</p>	<p>Potentially eligible clients become aware of energy assistance services</p>	<p>65,000 (100%) of potentially eligible clients increase awareness of energy assistance services</p>	<p>65,000 (100%) of potential clients achieve outcome</p>		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 25a

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report	
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes
Professional, respectful client-centered services at welcoming and orderly sites and for homebound Facilitated enrollment in Energy Assistance program	Outreach <ul style="list-style-type: none"> Staff engage in effective outreach activities to maximize participation by targeted groups Staff directly assists applicant's 	65,000 eligible clients will receive mailed notices of energy assistance enrollment information 65,000 eligible clients will receive follow-up mailed notices of energy assistance enrollment information 20,000 eligible clients will schedule convenient appointments at central or neighborhood enrollment sites	Potential clients increase knowledge and select convenient appointment sites and times Expected Outcome #1: Potentially eligible clients have had the opportunity to apply for energy assistance	65,000 (100%) of potential clients have the opportunity to schedule convenient appointments 65,000 100% of all potentially eligible clients have had the opportunity to apply for energy assistance	65,000 (100%) of potential clients achieve outcome 65,000 100% of potential clients achieve outcome				
	<ul style="list-style-type: none"> Staff will phone/contact Fixed Income list clients and complete enrollment Staff accommodate all LEP requests and needs In cooperation with Milwaukee County, Staff will develop a written Outreach Plan 	30,000 eligible clients will receive mailed postcard reminders of energy assistance enrollment information 15,000 Fixed Income list clients' applications will be completed or scheduled for completion by 10/1/2015	Expected Outcome #5: Fixed Income list have had calls for phone applications or appointments scheduled by the start of the energy season	15,000 100% of cases on the Fixed Income list have had calls for phone applications or appointments scheduled by the start of the energy season	15,000 100% of Fixed Income list clients achieve outcome				

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

A	B	C	C1		D	E	F	G		H
			For evaluation report	Actual level of Achievement				Actual level of Achievement	Description of changes	
Inputs	Processes/Program Activities	Outputs	Expected Outcomes	Indicators	Projected level of achievement	For evaluation report	Actual level of Achievement	Description of changes		
<p>ADA Accessible Neighborhood-based sites</p> <ul style="list-style-type: none"> Central-CA Downtown Offices Zone 4 & 2 South-Robles Center offices Zone 4 & 6 North-CA Fond du Lac Zones 1 & 2 West-West Allis City Hall Zone 3 & 5 More than 100 Satellite Sites and Flexible Mobile Sites ALL Zones (i.e., HACM housing, Mkt. Pub. Library and branches, etc.) <p>Establishment of a web-based appointment/enrollment process for virtually all clients</p> <p>Efficient, no-wait or short-wait Central Call Center appointment scheduling</p> <p>Easy to use no-wait, Online Appointment Calendar</p> <p>Referrals to Weatherization and other Urgent Needs Programs</p> <p>Access to enrollment in CA's Low Income Pilot</p> <p>Access to CA's more than 40 supportive services</p>	<p>Intake</p> <ul style="list-style-type: none"> Staff will visit senior center/housing sites and complete applications prior to start of energy season Staff promote and conduct easy, client friendly enrollment process Selected central and alternate sites will facilitate ease of access Site operation hours promote convenient enrollment to decrease wait time Clients select convenient daytime, evening or weekend appointments Staff conduct eligibility assessments for additional supportive services Staff accommodate all LEP requests and needs 	<p>10,000 Eligible seniors at housing sites are assisted to complete applications that meet guidelines</p> <p>10,000 eligible clients are assisted to complete applications that meet guidelines</p> <p>1,500 eligible clients will be enrolled in CA's LIP program</p> <p>65,000 clients will be assessed as eligible for Weatherization services</p> <p>65,000 clients will receive information and referrals to additional services</p>	<p>Expected Outcome #6: Senior center/housing sites have been visited or had dates scheduled for a site visit prior to the start of the energy season</p> <p>Clients receive assistance in completing energy assistance applications</p> <p>Eligible clients are qualified to receive Energy Assistance and Weatherization (if applicable)</p> <p>Clients become aware of and access additional services/benefits programs</p>	<p>10,000 (100%) of the seniors at housing sites have been visited and applications taken prior to the start of the energy season</p> <p>10,000 (100%) eligible clients will complete energy assistance applications</p> <p>65,000 (100%) of eligible clients will enroll and receive Energy Assistance and Weatherization (if applicable)</p> <p>65,000 (100%) of eligible clients increase knowledge of other available services</p>	<p>10,000 (100%) of eligible clients achieve outcome</p> <p>10,000 (100%) of eligible clients achieve outcome</p> <p>65,000 (100%) of eligible clients achieve outcome</p> <p>65,000 (100%) of eligible clients achieve outcome</p>	<p>For evaluation report</p> <p>Actual level of Achievement</p>	<p>For evaluation report</p> <p>Actual level of Achievement</p>	<p>Description of changes</p>	<p>113 Community Advocates, Inc.</p>	

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 28a

A B C C1 D E F G H

A Inputs	B Process/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report	
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes
State of the art computer technology and resident IT Department staff facilitating access to WHEAP system	<p>Complete and Process Applications</p> <ul style="list-style-type: none"> • Staff provide friendly, personalized assistance to clients in completing applications • Staff complete and process all applications in compliance with State guidelines • Staff accommodate all LEP requests and needs 	65,000 Verified client informations will be entered into the WHEAP system			WHEAP client application information will be complete and accurate	65,000 (100%) of client apps. will be entered with accurate information 65,000 (100%) of client apps. will be entered with accurate information to determine weatherization assistance	65,000 (100%) of eligible clients' completed applications achieving outcome 65,000 (100%) of eligible clients' completed applications achieving outcome determining weatherization assistance		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 23a

A Inputs	B Processes/Program Activities	C Outputs	C-1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report	
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes
Crisis Assistance Funds Expedited appointment/enrollment Trainers Workshops Call Center and Crisis Assistance Staff	Crisis Assistance <ul style="list-style-type: none"> • Staff will verify client eligibility • Staff will verify that client applications are complete • Staff will enroll crisis assistance clients in energy training workshops • Staff will respond to emergency assistance and life-threatening requests within the required time • Staff will link crisis assistance clients with case management and other supportive services 	3,000 Crisis assistance clients will enroll in energy training workshops 22,000 Crisis assistance clients will receive responses 500 Emergency Furnace Request will be responded to in a timely fashion 22,000 Crisis assistance will be linked with case management and other supportive services			Expected Outcome #2: Crisis assistance applicants will schedule an energy training/workshop in accordance with policy outlined in the Crisis Plan Expected Outcome #3: Requests for emergency assistance are responded to within 48 hrs. of receipt Expected Outcome #4: Requests made in a life-threatening situation are responded to within 18 hrs. of receipt Crisis assistance clients increase knowledge of supportive services	3,000 (100%) of crisis assistance applicants have been scheduled for an energy training/workshop in accordance with policy outlined in the Crisis Plan 3,000 (100%) of crisis assistance applicants complete energy training/workshop 22,000 (100%) of requests for emergency assistance are responded to within 48 hrs. of receipt 500 (100%) of requests made in a life-threatening situation are responded to within 18 hrs. of receipt 22,000 (100%) of crisis assistance clients increased knowledge of supportive services	3,000 (100%) of eligible clients achieve outcome 2,250 (75%) of eligible clients achieve outcome 22,000 (100%) of responses achieve outcome 500 (100%) of responses achieve outcome 16,000 (75%) of clients achieve outcome		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 298

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes	
Facilitated referrals to local weatherization agencies	Emergency Furnace Services <ul style="list-style-type: none"> Staff advise clients about qualifying for Weatherization Staff provide referrals to Weatherization agency Staff will process invoices and complete client file 	500 clients are referred to Weatherization program agency			500 (100%) clients will request emergency furnace services	500 (100%) clients receive emergency furnace services	500 (100%) clients achieve outcome			
Application and client file review	Fraud <ul style="list-style-type: none"> Staff record and report all suspected incident of fraud 	0 client records indicate fraud			0 (100%) suspected fraud cases will be reported	0 (100%) clients will be denied services because of fraud	0 (100%) of denials will achieve outcome			
Quality Assurance procedures in place and applied	QA <ul style="list-style-type: none"> Program files are reviewed for accuracy and compliance 	10% of all files will be reviewed			2-5 % error rating will be achieved	100% of all cases will have accuracy after QA review	95-97% of all files will be completed with accuracy and compliance	1		

PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 43a

A Inputs	B Processes/Program Activities	C Outputs	C1 For evaluation report		D Expected Outcomes	E Indicators	F Projected level of achievement	G For evaluation report		H
			Actual level of Achievement	Description of changes				Actual level of Achievement	Description of changes	
Management staff	<p>General Program Compliance</p> <ul style="list-style-type: none"> Agency will meet with Milwaukee Co. staff to discuss program and performance standards Agency will participate in quarterly Energy Strategic Planning Group meetings Agency will send at least one employee to all State WHEAP meetings, training sessions and conferences Reporting will be completed on a consistent and timely basis 	<p>1 (minimum) agency representative will attend all scheduled meetings and events</p> <p>1 agency representative will provide timely and accurate reporting</p>			<p>Agency representative will attend all meetings and events</p> <p>Agency will prepare and provide timely and accurate reports</p>	<p>1 (100%) agency representative will attend all meetings and events</p> <p>1 (100%) agency representative will provide timely and accurate reports</p>	<p>1 (100%) agency representative will achieve outcomes</p> <p>1 (100%) agency representative will achieve outcomes</p>			



**Response to RFP
Milwaukee County Department of Health and Human Services
Management Services Division**

Wisconsin Home Energy Assistance Program #MSD001

ADMINISTRATIVE ABILITY

Agency and Programs Management

Agency Experience

Community Advocates is a community-based social service organization that works with low-income and disabled individuals and families to ensure access to public and private programs and services that they may require to meet their basic needs. Founded in 1976, Community Advocates offer more than 40 programs that provide assistance in the areas of housing, utilities, health care, behavioral health and family violence. CA's Public Policy Institute advocates for sound and effective human services practices.

- Housing Advocacy programs provide a continuum of services ranging from emergency shelter to Rapid Rehousing and Homelessness Prevention which ensure safe, affordable housing for all. *Community Advocates was chosen in a competitive process as lead agency for homeless prevention program (Emergency Solutions Grant) administered and funded by the State of Wisconsin Department of Administration-Division of Housing Programs and as such provides coordination between all homeless service providers in Milwaukee County.*
- Heat & Utilities Advocacy programs provide outreach and enrollment services, crisis assistance and intervention to ensure continuation of necessary utility service. Services include budget and money management counseling to help clients establish and maintain payment plans that improve credit worthiness while facilitating establishment of a positive credit record with utility providers.
- Disabilities Advocacy programs assist clients in preparing SSI and SSDI applications and appeals.
- Behavioral Health programs provide protective payment services for homeless individuals and families who have severe and persistent mental illness and/or a dual diagnosis. The Division also operates Autumn West Safe Have for chronically homeless individuals who suffer from mental health and addiction issues and the Homeless Outreach Nursing Program that provides case management services to individuals living in unsheltered circumstances.
- CA's Milwaukee Women's Center Division operates emergency shelter for women and their children who are victims of domestic violence and is one of only two emergency shelters in Milwaukee County. Supportive services include children's programming, drug and alcohol addiction treatment and counseling, batterers' treatment, and Milwaukee's only shelter with programs serving victims of elder abuse. CA also operates an emergency shelter for homeless women and their families in same location which offers

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an array of supportive and benefits enrollment services that assist clients in regaining self-sufficiency and self-determination.

- Through its Public Policy Institute, CA administers and supports strategies to prevent and reduce child abuse and neglect, youth violence and delinquent behavior, youth alcohol and other drug use and abuse, and non-marital pregnancy.

Although the administration and management of this breadth of programming may appear complex, each Division's programs are woven solidly into an integrated services matrix designed to meet the basic and urgent needs of CA's customers. Each of CA's programs meets or exceeds projected client and service goals, provides timely and accurate reporting and displays responsible and transparent fiscal management.

Experience Providing Energy Assistance

For nearly forty years, Community Advocates has been working to help individuals, families and the elderly and/or disabled with issues concerning utility disconnections, reestablishing service, developing affordable payment plans, gaining access to resources for basic needs, providing energy management education and exploring whatever resources are necessary to maintain health and safety within their households. Community Advocates' Energy Assistance Outreach Program was created as a result of ongoing energy crises in the low-income communities of Milwaukee County. Since 1985, thousands of Milwaukee low-income families have been able to control their utility bills for heat and electricity by linking with Community Advocates. Through the Milwaukee Energy Network, Community Advocates has had a positive impact on resolving energy-related problems experienced by low-income Milwaukee residents.

Community Advocates has been a pioneer in providing advocacy for individuals, families and for the elderly and those with disabilities who have little voice and no experience in dealing with utility disconnections, service reestablishment, negotiating affordable payment plans, gaining access to basic needs resources and accessing energy management education and strategies. Community Advocates' renewed contracts to provide Energy Assistance enrollment, crisis services, the Energy Assistance Outreach Program, and public benefits services has helped maintain lifelines for Milwaukee County's most vulnerable populations.

Community Advocates has delivered energy assistance advocacy for more than 30 years and has operated its Milwaukee County Energy Assistance application and outreach program for 15 years with no quality assurance findings or corrective action plans. In 2011, CA proposed a transformative on-line scheduling and enrollment process. The results were reduced client wait times, faster client document retrieval and a more efficient use of staff resources. Outreach efforts targeted and reached Milwaukee's most vulnerable households. Crisis applications received were guaranteed priority service.

The proprietary scheduling and enrollment software developed by Community Advocates' IT staff allows for internal management and improvement while allowing clients to request energy assistance appointments and services from any computer terminal, at home, at the library or from a referring agency. A kiosk system installed in CA's lobby enables clients to easily type in basic information and the program will guide them through the process in short, understandable steps. CA is the only agency using this time-saving system. To augment the scheduling system, CA later developed an internal appointment screen that is used by

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Enrollment Specialists and Utility Advocates to identify the next client appointment, elapsed wait time, number of clients waiting and more. This allows the Enrollment Specialists and Utility Advocates to quickly assess client needs and direct them to the specific staffer as quickly as possible. The appointment screen lists all scheduled clients and walk-ins and identifies special and priority needs such as seniors, those with disabilities, non-English speakers and more. Enrollment Specialists and Utility Advocates can use the screen to identify and fill open appointment slots for new applicants. The system also records the amount of time the client spends with their advocate and matches the client name to staff so if a return visit is required, the client will be assigned the same staffer to provide expedited and more personalized service.

CA's Call Center Facilitators are trained to use the WHEAP system and are able to complete applications. Facilitators can close out incomplete applications increasing processing efficiencies and decreasing client wait time.

CA's dedication to identifying and serving all eligible households has resulted in enrollment and services that exceed required and projected outcomes. Although no official report has yet been issued, feedback from the State of Wisconsin DOA, Division of Energy Services Administration Monitors indicates that CA has exceeded expectations in customer service, meeting enrollment goals and in providing effective outreach to attract eligible clients who are using the service for the first time. CA's proprietary, client-friendly, web-based scheduling/enrollment program was especially praised for ease of use, secure and confidential client record keeping, efficiency, and the ability to quickly retrieve data for evaluation purposes.

The system itself is designed to be flexible and can be easily accessed at any location simply by using the linked, on-line enrollment process. All that is required is an Enrollment Specialist or Utility Advocate and a laptop. Applications can be completed in any setting or site. The system has proved especially useful for home visits as the specialist can arrive at an agreed upon time with a completed application that only requires a signature. Because of system portability and reasonable costs, the Wisconsin Home Energy Assistance Program could consider use of this web-based system by other counties or municipalities help establish consistent and simplified enrollment practices. The system has the capability to track appointments system-wide to prevent "agency shopping" (individuals making multiple appointments.)

With the improvements implemented over the last contract period, CA has provided the following increased or new services.

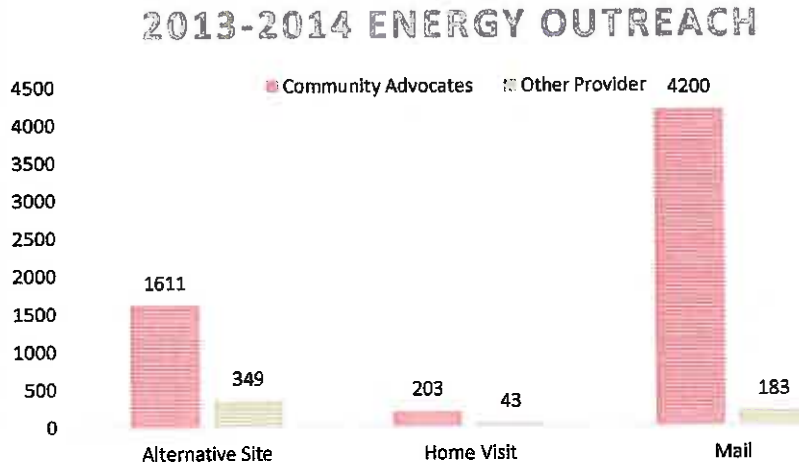
- From January 2014 through December 31, 2014, more than 30,000 individuals applied for either Energy Assistance or Crisis Assistance at our James Lovell site according to data collected using CA's Kiosk system
- CA increased its number of senior service sites from 51 to 66.
- In December 2014, CA began administering the emergency furnace program. To date, 41 referrals have been made to the weatherization agencies. Many of those served were first time applicants.
- In not heat situations CA has 24/7 on-call staff and deliver space heaters until a furnace vendor can be dispatched.

- An improved communication process was implemented between CA (WHEAP agency), Weatherization and Energy Assistance customers.
- For the 30,000 applicants in the 2014-15 Energy Season, CA completed 10,135 applications---more than one third of the total although contractually responsible for 25%.
- Through March 1, 2015, of the 10,135 applications, CA energy staff completed
 - 1,800 mail or phone applications for seniors and individuals with disabilities
 - 1,900 applications at senior sites
 - 105 applications were completed through home visits to seniors and individuals with disabilities
- At peak times, applicant wait times are less than 30 minute though most fall within CA's 15 minute target

[Please see Attachment B for examples of client service provision.]

Ongoing Internal Evaluation

Using State of Wisconsin data, Community Advocates also conducts ongoing, internal analyses to informally measure program outcomes to assess progress and that inform staff about necessary adjustments or improvements that will better serve our clients. The following graph charts 2013-14 outreach efforts to date.



SERVICE PLAN AND DELIVERY

Proposed Program Overview

Community Advocates is proposing to administer outreach, WHEAP regular and crisis benefits, WHEAP crisis assistance and furnace services to the six Service Zones established by Milwaukee County. CA's proposed scope of service is solidly based on effective current practices and will include improvements, innovations and modifications developed using "lessons learned" from years of practical management experience. All deliverable services will be available in each zone at times and locations that are most convenient and tailored to meet the specific needs of residents of that zone. Enhanced outreach activities will target low-income and underserved households with emphasis on reaching and informing those that include: the homebound elderly and disabled, young children, non-English speaking individuals, first-time applicants, and those who have been reluctant to apply because of social stigma.

During the last Milwaukee County Energy Assistance Program contract period, Community Advocates enlisted the support and collaboration of dozens of social service agencies and governmental entities to provide referral, outreach, and program access services. Of special note, CA engaged in Memoranda of Understanding with Milwaukee County Public Library and several of its branches to provide satellite enrollment sites as well as the services noted above. Through this experience, CA has identified strengths and weaknesses in choices of enrollment locations, ability to reach target populations and service hours.

- By analyzing each element of program service delivery, CA has determined that expansion of MOU agreements to include other partners will help improve access to Milwaukee County's energy assistance eligible households. Each was chosen because service focus includes thousands of low-income households and each has the ability to widely distribute outreach information, provide high volume enrollment sites, and share professional management experience. These include the Housing Authority City of Milwaukee (HACM), which owns more than 1,000 units of rental housing and manages over 4,000 units of low-income, including provision of 5,700 Section 8 vouchers. Hunger Task Force serves more than 9,000 individuals each month at the Robies Center (910 W. Mitchell St.). Their services include benefits enrollment (food share, Medicaid, social security benefits and general advocacy; and Milwaukee County Housing Division which administers Section 8 Housing Choice Voucher Program and through the Division's Special Needs department which provides permanent housing for individuals with disabilities who were previously homeless and are first-time applicants.
- Other supporting partners—the City of West Allis, Jomela Property Management Co. and Woodlands Condominium Complex have signed MOUs. Letters of support from of governmental departments, agencies and organizations—agreed to distribute outreach and informational materials, provide enrollments sites, coordinate efforts and do much more to assist Community Advocates in reaching target groups and all those households who qualify for services to ensure that program enrollment increases.



Outreach

Outreach and Enhanced Strategies

Community Advocates Energy Assistance staff will provide direct outreach services that maximize the participation of homebound households, including the elderly and disabled; households with young children; non-English speaking households; and those that are first-time participants that are unaware of the program or are reluctant to participate for various reasons.

Community Advocates will operate four permanent sites and over 100 enrollment sites distributed throughout the six service zones covering Milwaukee County. All are physically (compliant with ADA regulations) and geographically accessible to the targeted households. Community Advocates will have a combination of enrollment site structures including - **permanent sites** (open 5 days per week, scheduled hours of operation, extended hours in peak times; **satellite sites** (sites in an established locations, locally convenient with established but fewer days of operation and limited hours that are designed to meet client volume and reduce staff down time); and **flexible mobile sites** (portable service centers that can cover single, large locations or even a building and are available on a specific day, at any convenient time for applicant enrollment. Flexible mobile sites will be utilized in cooperation with management partners for large unit buildings, housing complexes and other locations in which residents are centralized).

Using the State-provided "Fixed Income List" Community Advocates will send postcards to all eligible participants. The postcard will identify the assisting case worker and state when they will be contacted for a mail or phone application. By providing the postcard, clients will know their appointment date, thus reducing uncertainties and multiple callbacks.

Community Advocates will continue and expand outreach to senior housing complexes. Energy Assistance staff will provide all necessary assistance in preparing and submitting the applications of persons at the site. To fully cover senior site scheduling, CA Energy Assistance staff will contact the site manager to set-up an enrollment date. Senior residents can sign-up on that day and CA staff will telephone to schedule an enrollment appointment. To determine how many staff to send, CA will adapt to client preferences and sufficient flexible staff hours will be dedicated to cover enrollments.

Public Information

Community Advocates plans to provide public information promotion that will reach the broadest possible audience. Efforts will include public service messaging, postcards, fact sheets, flyers, brochures, posters, etc. [Please see Attachment C for draft examples.] Materials will be distributed by CA and its referring agencies and be available at all outreach/enrollment sites. CA will use a combination of mailings, postings, on-site distribution and word of mouth. CA will be responsible for all inquiries regarding

Public Information materials will

- Publicize eligibility requirements, how to apply, location of application sites, times of operation, etc.

- Publicize the availability of home energy assistance, crisis assistance and weatherization services
- Provide much needed "energy issues" information to Milwaukee County's community-based agencies; for-profit, low-cost and no-cost health care providers; elected and appointed officials; and low- and fixed-income consumers
- Provide energy information to potentially eligible groups and individuals by distributing printed materials. Materials will be produced to include and be accessible to eligible clients with limited or no English proficiency (LEP)
- Include press releases for the media, in coordination with TEAM MILWAUKEE, outlining eligibility criteria, application sites, documents needed for application, etc.
- Reference and identify the program as being administered by the State of Wisconsin Home Energy Assistance Program in all program materials on all published materials
- Include a contact phone number clients can call for heating emergencies and also use to access WHEAP information year-round
- Coordinate efforts with IMPACT 211 to manage after hour calls.
- Coordinate with other local program offices to facilitate distribution of WHEAP Information and application intake when receiving other services
- Provide information on transportation to application sites

The following is a list of activities in the currently in use and Outreach Plan that will be developed in cooperation with Milwaukee County.

Community Advocates Energy Assistance Outreach staff will

- Arrange an early application period for identified target groups throughout Milwaukee County such as households with disabled persons, elderly persons, children under six, low-income and working poor who are experiencing energy burdens or are at-risk of energy disconnection.
- Provide home assessments upon request by agencies including Public Service Commission, Milwaukee County Department of Health and Human Services, Milwaukee County Department on Aging, utility providers and telecommunications companies, with in-house follow-up services.
- Provide energy outreach for the elderly and disabled residing in subsidized housing in Milwaukee County.
- Outreach to low-income Asian families by word-of-mouth (in our experience, the most effective method in this population) and by using bilingual brochures and fliers, community-based organizations serving the Hmong, Laotian and Southeast Asian populations
- Outreach to low-income Hispanic families by word-of-mouth and by using bilingual brochures and fliers, community-based organizations serving Latinos, Latino families and Latina populations
- Attend and present at resource and community fairs, outreach events.

To further support outreach efforts, a link to WHEAP information is prominently featured on Community Advocates' website home page. By clicking on "Energy Assistance", clients can access application requirements, application sites and hours of operations, emergency/afterhours information, and the Milwaukee WHEAP flyer. The site offers links to state WHEAP information and applicants can link directly to CA's online enrollment system.

Enhanced Outreach through Partnerships

The following governmental departments, human service agencies and housing providers have signed Memoranda of Understanding with Community Advocates and will significantly improve CA's ability to provide outreach to thousands of eligible Milwaukee households.

- Housing Authority City of Milwaukee (HACM) Please refer to Attachment G for a map of all HACM housing sites that will be served by Community Advocates.
- Hunger Task Force
- Milwaukee County Department of Health & Human Services Housing Division

MOU partners have agreed to provide two or more of the support services and activities listed below allowing CA to draw upon the selected, varied and specialized experience of each.

- Assist in the coordination of the project
- Distribute outreach and enrollment information to tenants and customers
- Provide referrals of nonparticipating but potentially eligible energy assistance clients to Community Advocates
- Provide internet service and printing capabilities to Community Advocates staff at the Robles Center for assisting clients with energy assistance (Hunger Task Force)
- Identify available enrollment sites
- Collaborate on establishing days and time of operation, provide fully ADA accessible community room space and facilities at agreed upon sites

[Please refer to Attachment D for copies of each MOU.]

The following governmental entities, agencies, rental property management firms, etc. have agreed to provide a variety of collaborative efforts to support to Community Advocates in its proposed operation of the Milwaukee County Energy Assistance Program. The following have provided Letters of Support of MOUs.

- The City of West Allis
- Jomela Property Management of Milwaukee
- Milwaukee Public Library (various branch libraries)
- West Allis Library
- Hales Corners Library
- Woodlands
- Berrada Properties
- Heartland Housing's Maskani Place
- Neighborhood Community Centers throughout Milwaukee
- Centro Hispano Milwaukee

These collaborating partners have agreed to provide the following support either singly or in combination.

- Distribute outreach in energy assistance enrollment materials at various partner agency sites

- Permit Community Advocates to set up enrollment sites at central offices during peak traffic days
- Assist in identifying sites, days and times that best serve customer needs
- Include CA Energy Assistance enrollment information in communications to tenants and customers
- Provide enrollment sites either on a regular schedule or a temporary (high volume time) basis
- Accommodate and provide limited (but necessary) assistance to CA's Energy Assistance workers
- Open invitations to discuss additional ways in which partners can be of assistance

[Please refer to Attachment F for Letters of Support.]

Energy Assistance Program and Enrollment Services

Community Advocates is proposing to continue and improve the transformative and simplified web-based enrollment system introduced for Milwaukee County's Energy Assistance program. The system provides consistent client information and application scheduling and can be used in conjunction with more traditional access opportunities, i.e. phone requests, walk-ins and home visits. It has helped restructure and improve current home energy assistance enrollment, public benefits, crisis assistance and outreach services. This model respects the time constraints of clients and builds in efficiencies for the program administration and staff. This model respects the worth and dignity of each person by treating each as an individual and not a number.

Community Advocates has designed a web-based appointment screening and enrollment system that efficiently serves the majority of clients and has eliminated lines, has significantly shortened wait times, and allows for neighborhood access at locations and times that are convenient. Even though the system works, it is still somewhat underutilized and there is much to be done to encourage its use. Customers do not like change. Many clients are still willing to wait in line thinking that there is no other alternative. CA will begin a full-blown outreach program that will familiarize clients with the system. Kiosks in CA's lobby have been redesigned and entry screens have been simplified to encourage use.

Community Advocates has also identified and plans to locate primary and satellite sites in locations and areas that are most accessible to eligible clients based on analysis of eligible client demographics in the six service zones that will include CA's past experience in serving those areas. CA will offer daytime, evening and weekend scheduled service hours at all primary sites and satellite sites during peak seasons and daytime, evening and weekend appointments at primary sites year round. CA will introduce special scheduling for senior sites to coordinate with each location and accommodate regular activities or routines.

Meeting Customer Needs Through a Workable Enrollment Plan

Client survey results, client comments or complaints, staff review and observations and thorough research of Energy Assistance best practices influenced and provided the basis for the design of Community proposed Energy Assistance program. The common issues of dissatisfaction with the older Energy Assistance program enrollment process still predominate.

As these are now more likely to be misconceptions rather than the norm at CA, we will focus proposed activities to ensure that clients understand these issues no longer exist within our program.

Collected findings indicate that some clients still believe they must

- Stand in line for hours
- Arrive as early as 5 am to get a number and then wait again
- Be treated like a number
- Become frustrated by long waiting times
- Sit in crowded waiting rooms
- Be turned away and have to return another day
- Answer the same question or provide the same information time and again
- Travel great distances
- Miss a workday

CA's model has achieved the following

- Eliminated lines
- Scheduled appointments
- Treats clients with respect and dignity
- Treats each client as an individual with particular sensitivity to cultural differences
- Reduced wait times and crowded waiting rooms by hours
- Reduced duplicative paperwork
- Eliminated missed workdays and unnecessary urgent childcare expenses
- Reduced travel distance and time
- Clean, friendly, professional atmosphere.

Additionally, CA discovered that County residents in southeastern, southwest and suburban areas residents are reluctant to come to a social services agency because of a perceived social stigma and fear of embarrassment. These households prefer mailed information, telephone applications or home visits to complete their enrollment process. CA's efforts in these areas will be tailored to clients' preferences understanding their reluctance while recognizing the positive impact benefits and assistance can have on their households. CA can honor the dignity and concerns of each applicant.

Continuation of Service and Implementation of Program Improvements

Program Model: Screening, Appointments and Enrollment

Community Advocates client friendly screening and enrollment process can be accessed on-line. *Whether a client uses their phone to reach the Call Center, or is helped by another agency to schedule an appointment, or choose to go online themselves—the web-based system facilitates and creates accurate, real time, coordinated appointment scheduling—with minimal or no waiting.*

Hunger Task Force, the Department on Aging, legal services, 2-1-1 and dozens of social service agencies make referrals and are given immediate access to an assigned Enrollment Specialist or Utility Advocate for their referrals. There is no wait time when the application is initiated by another agency at a remote location.

In 2011, CA estimated that approximately 85% of eligible clients would take advantage of on-line screening and appointments by accessing the system themselves, accessing the system with the help of a referring agency or case worker or by using Community Advocates Call Center. The remaining 15% of applicants would be those on the Fixed Income list and walk-ins who receive prompt, personal service for applications and for urgent assistance. These percentage estimates prove to be extremely helpful in determining ongoing service delivery and help indicate necessary modifications. [We urge Proposal Reviewers to log-in and visit the live system. Paste or type <https://www.ca-apps.org/basicneeds/energyassistance.aspx> into your browser to access the start page.

The On-line Screening Tool

The on-line screening tool is used to preapprove applicants who are potentially eligible. Clients (or a CA Call Center Facilitator or a representative/case manager from a referring agency) can input income for the last three-months, family-size and energy expenditure information. The client will then be directed to an appointment calendar screen. [Please refer to Attachment E for an example of the Screening Tool and examples of the Appointment Screens.] Clients can then make appointments for enrollment by clicking on a convenient location on the screen—times of operation are posted next to each site choice

A list of dates specific to each site appears and clients can click on an appointment time, type in required information and receive confirmation by return email. Clients making appointments using the Call Center will be entered into the same system and be asked to record appointment information and read it back to the Call Center Facilitator to verify. Clients will be advised on-line or by the Facilitator about required documentation that must be presented at the appointment. **Income verification will be confirmed by CA's Screeners prior to the appointment using the CARES database eliminating the need for the client to provide additional paperwork.** The same process is followed at satellite sites and for home visits so that all required information including income verification can be completed using CARES prior to visiting the client. Only a signature will be required to complete enrollment.

Enrollment Made Easy

The vast majority of Energy Assistance enrollments take from 10-15 minutes to complete. The on-line Appointment Calendar schedules at 15 minute intervals, include 10% overbooking at peak times (an industry standard), and, using normal attrition rates, will allow Enrollment Specialists and Utility Advocates to accommodate walk-in and crisis clients. CA will thus be able to serve all clients who need emergency assistance immediately and in-person.

CA has learned through experience that during non-peak enrollment times, appointments are more often missed. At these times, the overbooking percentage increases to ensure that all customers are served and that walk-ins can be slotted into no-show spaces easily. We accommodate five standbys at a time and, as each is served, the space is opened for another

walk-in or stand-by replacement. This maintains the highest level of customer service with no for staff.

We believe that this system will guarantee enhanced client service, at convenient locations and at convenient times.

Community Advocates proposed Energy Assistance Program will adhere to all required program components in addition to the program enhancements outlined above.

IT Support and Web-based Screening/Enrollment

The *On Line Appointment Maker* was developed by CA's IT department to provide easy, confirmable requests for information, screening and enrollment for potential Energy Assistance customers and staff. Requests for appointments at specific sites and for specific times informs CA about the need to increase staff at sites and at times experiencing heavy traffic, or decrease service at any given site or time to allow staff to travel to highly popular sites at times that are convenient to customers.

This plus the experience gained over the last contract period has allowed CA to modify hours and plan for staff relocation at satellite enrollment sites to maximize service in high-use area and decrease or eliminate sites with little or no traffic. This also has provided information about the need to use alternative methods, such as home visits, to increase participation.

The *On Line Appointment Maker* will be highlighted and easily identifiable on at <http://www.communityadvocates.net>, CA's website, where information about Energy Assistance will be available. Potential applicants will be encouraged to schedule an appointment to apply for assistance. When the browser selects "Click Here to Make an Appointment", the scheduling module will open.

The main features of the module are:

1. Customers can establish potential eligibility based on responses to two questions (household income and household size). The customer will receive conditional verification about eligibility. CA will stress that the verification is preliminary until final eligibility is determined by completing a full application. If potentially eligible, a new screen will appear.
2. A map of Milwaukee County is displayed with pushpins representing sites available for appointment. An applicant will be directed to select a site simply by clicking on the pushpin. Upon making a site selection, a new screen will appear.
3. This screen will list available dates/times for making appointments displayed in a table in ascending order by date. The client will be directed to select an open date and time. At this point, the potential applicant has selected a site, date and time.
4. A new page will then open requesting the individual to provide limited personal information (name, address, telephone number) so that staff can begin preparing the application in anticipation of the appointment. If the potential applicant enters an email address, an

appointment acknowledgement will be immediately sent with a reminder of the information the applicant must bring to the appointment.

[Please refer to copies of 'print screen' samples of web-based screening and appointment pages Attachment E.]

Additional improvements are included in this proposal based on customer and staff needs and requests. CA has added wall-mounted scheduling screens in the secure enrollment area. This allows the Enrollment Specialists and Utility Advocates to identify the next client appointment by name, elapsed wait time, number of clients waiting and more. Advocates can quickly assess required services and then direct clients to the specific staffer as quickly as possible. The appointment screen lists all scheduled clients and walk-ins and identifies special and priority needs such as seniors, those with disabilities, non-English speakers and more. The system also records the amount of time the client spends with their specialist and matches the client name to staff so if a return visit is required, the client will be assigned the same staffer to provide expedited and more personalized service. The few times a customer is unable to complete an application and needs to return with additional information is given priority place in line and quickly enrolled. In addition, receptionist staff members have been WHEAP trained to close out incomplete applications.

We have also found that the *On Line Appointment Maker* has aided in internal program evaluation. We can now generate reports that help us increase productivity and analyze referral sources. We can then adjust staffing to accommodate high and low volume times and sites.

The following data categories are available for analysis and to assist in program evaluation.

- Number of clients
- Number of clients by name and program
- Number of repeat clients
- Number of referrals from specific agencies
- Client wait times
- Amount of time spent with Enrollment Specialist
- Match client to specific specialist
- Total time of visit

Lessons Learned and Proposed Program Improvements

Following are several new or contributing features of Community Advocates' Energy Assistance program that we will either incorporate or modify to better serve our clients while continuing to meet the requirements of the program.

- Because of enormous outreach and enrollment success CA experienced at Milwaukee's senior sites, CA will now use same blanket approach in collaboration with our new MOU partners HACM, Milwaukee County Housing Division, Hunger Task Force, City of West Allis, Jomela Properties and Woodlands. (Please see details of planned collaboration on page 126 of this document.)

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- We will continue to schedule hours and staff based on zone need and location of each enrollment site. We learned from the performance of our library satellite sites that, in some instances, there was insufficient traffic or site use to warrant participation. Others were either under or overstaffed to varying degrees. Corrective scheduling alleviated the problems but for this contract period, we anticipate using a more informed process and believe that staffing patterns and enrollment locations will better reflect client volume and appropriate office hours. Site selection within zones was driven by Milwaukee County's energy assistance enrollment reports and also by experience gained during the last contract period.
- CA's unique kiosk system has been retooled to a simpler sign in and online enrollment system. Because CA's web-based enrollment system was designed internally, it is extremely flexible and user friendly. When the clients first encounter the kiosk screen, they will see Guest Page 1. They simply click on Start and then will see Guest Page 2 where they select a Reason for Visit and then enter their first and last names. The system moves them through the appropriate process in the same easy format. Our IT staff also has the latitude to accommodate special services such as making outside referrals a priority. These system improvements are incorporated into our proposed service plan.
- CA also encountered rising missed appointments during non-peak season—almost 50%. We then adjusted our stand-by policy to a higher overbook rate so that scheduled appointments can be filled consistently and additional slots are available to walk-ins.
- CA will continue and even expand mail (including self-addressed stamped envelope) and phone applications although, on the surface, they may appear to be duplicative or inefficient. In fact, these enrollment methods expand CA's ability to reach those who cannot come to a physical location and also to those who prefer not coming in due to personal preferences. These applications will reach many elderly and first-time applicants who are unfamiliar with or reluctant to use the system.
- The mail or phone application is followed by a brief home visit so the client can sign their form and guarantees easy enrollment. CA proposes to use these methods as they help reduce traffic flow during busy seasons and allow reluctant clients to stay at home. A postcard will be mailed furnishing the client with the energy worker's name and the precise time of visit.
- CA also proposes that any senior or any client who is physically disabled and identified by sight in the waiting area be given priority service.
- During peak season, CA will not add to already extended hours as we have learned that past traffic patterns have indicated that this is unnecessary.
- CA will dedicate a staffer to help initiate a tracking system that will capture client and referral data, client and potentially, stakeholder comments and recommendations/criticism. A recently purchased telephone application will

automatically track calls, the contact person(s), time of day, length of call and response times. This additional information will again help CA in analysis and evaluation of the quality of customer service.

- To ensure that non-English speakers, households with young children, first time applicants and especially homebound elderly and those with disabilities have priority access to services, Community Advocates will provide direct marketing pieces that include a direct telephone line for applications. Callers who use this number will be asked a brief screening question to prevent abuse or "cutting in line" by those who do not meet these criteria but have managed to identify the number.
- Spanish speakers will also use a direct dial number to get immediate scheduling and/or enrollment.
- In the last contract period, Community Advocates estimated a wait time of 15 minutes for each client. CA's scheduling system confirms clients with scheduled appointments wait only 5-15 minutes—a significant improvement and less than that of other program providers. CA proposes to continue to provide this improved service.

Intake

Community Advocates Energy Assistance staff will provide intake services for all potentially eligible participants in Milwaukee's County's Energy Assistance and Weatherization Programs. To accomplish this, CA will use its established central Call Center staffed by facilitators who will be able to provide information, screening and schedule appointments for enrollment through CA's on-line screening and appointment system with special consideration given to customer service.

Call Center: Community Advocates is adept at managing the high volume of calls generated by the Energy Assistance Program. We currently have an NEC SV8100 system with the embedded Automatic Call Distribution (ACD) System. The ACD System allows Community Advocates to monitor the incoming call volume and respond quickly to ensure that 80%+ of Energy Assistance callers are answered within 35 seconds. This is based on two assumptions: reduced calls due to postcards and increased call center staff at peak times.

The system provides a real-time display for Supervisors providing valuable information about how long callers have been waiting along with agent information. The identifying system also allows referring agencies to receive priority service as agreed. Agents and Supervisors easily retrieve statistical information about the call queue by simply pressing a button on their phones. If callers hold times exceed a pre-determined threshold, such as 35 seconds, the system automatically sends alerts to agents and supervisors' telephone displays. Additionally, callers are presented with choices if they choose not to wait by being able to dial another extension or a voicemail box so agents can return the call. These capabilities all help in managing the callers experience to ensure a high level of customer satisfaction.

Supervisor's also have a wide range of reports to assist them in analyzing traffic by day, by hour, by agent, or how many calls were abandoned. These reports assist Community Advocates in providing adequate staffing levels at specific times of the day or days of the month to ensure that calls are handled within a timely fashion.

Utilizing our current experience with Energy Assistance Calls, our analysis indicates that our system and staffing model meets the best practice threshold identified and provides us the tools to adjust as call volumes change.

Community Advocates has designed a system of year-round and peak season flexible sites that will conveniently provide neighborhood access for Energy Assistance applicants in the six identified service areas that indicate the highest need and highest potential customer volume. Site selection is based on service area client eligibility (based on past applications) and identified potential client households. Sites have been selected to serve areas that can anticipate significant traffic and can also increase or decrease staff, days and hours based on actual client appointment scheduling. The site locations also consider reduced household eligibility and will be staffed accordingly.

Community Advocates can receive calls and messages 24 hours per day, 7 days per week and retrieves and returns calls in the order received within 1 business days.

Using Zone Enrollment Data to Drive Program Design

Advantage of Experience

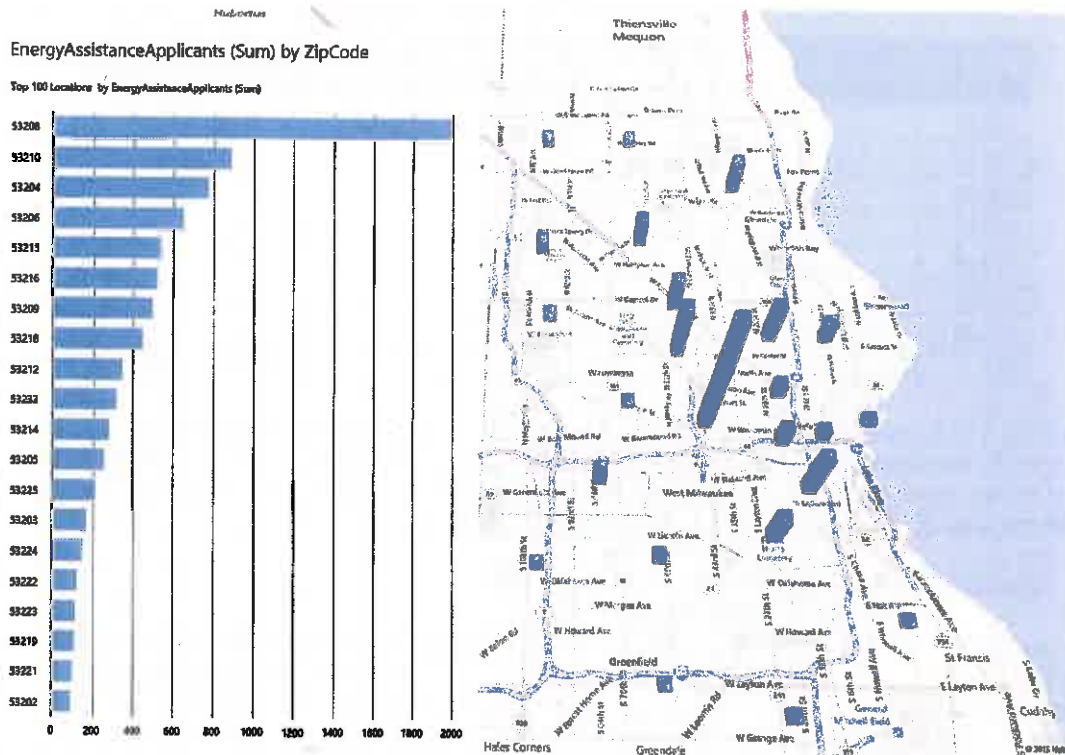
Using a combination of the data provided by Milwaukee County and Community Advocates' agency data, demographic information and experience collected in each of the six service zones, Community Advocates proposes to provide Energy Assistance services in each of those zones. We are well aware of customers' unique proclivities whether it be a preference to use a local enrollment site, one that is closer to their job, a small or large site, inability or reluctance to leave their homes, and many others. So CA recognizes that local areas sites will serve the vast majority of its residents but also acknowledge that boundaries can be fluid and services must be convenient to every customer.

According to data provided to Community Advocates by We Energies, energy assistance applications have increased 2-5% each year and the number of eligible households has increased slightly over the last five years. Numbers have remained stable no spikes no surprises. However the number of eligible non-enrollees is still high providing opportunities for better and more personal outreach tactics that will introduce the program to first-time applicants and the more reluctant clients. This indicates need to provide more targeted and effective outreach efforts and assistance to maximize the participation of ALL eligible households in Milwaukee County especially those in defined target households.

Community Advocates' realistic enrollment expectations are based on successful past experience and we can anticipate higher enrollment from the target households knowing that we can accurately project participation by employment of our proposed increased and more effective outreach efforts. CA knows its customers and, having previously served the eligible

households and target groups in all 6 zones, is secure that our enhanced outreach efforts and efficient enrollment procedures will increase participation in this contract period.

Tailored Enrollment and Service Delivery by Zone



The map above depicts Community Advocates' current energy assistance enrollment volume by zip code and, therefore, can be correlated to reflect the minimum anticipated traffic in each of the six services zones. Using this current pattern in combination with the service numbers provided by Milwaukee County and taking special care to focus attention on High and Medium areas for Outreach, CA has developed a strategy that can provide information, schedule appointments and complete enrollment that will be tailored to meet the special needs of the populations residing in all six zones.

The following description of current and prior service, established needs and opportunities in each zone, supports Community Advocates' action plan to organize efforts so that they maximize the impact of outreach efforts, address target populations, situate enrollment sites in the most convenient and accessible locations, thereby by increasing enrollment throughout Milwaukee County. Community Advocates will work with a combination of enrollment site structures including: **permanent sites** (open 5 days per week, scheduled hours of operation, extended hours in peak times; **satellite sites** (sites in an established locations, locally convenient with established but fewer days of operation and limited hours that are designed to meet client volume and reduce staff down time); and **flexible mobile sites** (portable service centers that can cover single, large locations or even a building and are available on a specific

day, at any convenient time for applicant enrollment. Flexible mobile sites will be utilized in cooperation with management partners for large unit buildings, housing complexes and other locations in which residents are centralized).

Zone 1

Zip Code	Population	Outreach Opportunity	High Applicant Area	Total App	Portion of Budget
53210	4021	High	Yes		
53216	4730	Med	Yes		
53218	5169	Med	Yes		
53222	1221				
53223	2207				
53224	1930				
53225	2650				
ALL	21928			33%	\$ 733,414

As Zone 1 is currently the highest enrollment area, Community Advocates will maintain current successful enrollment activities and direct increased outreach efforts in zip codes 53210, 53216 and 53218. Working in collaboration with partner sites in this zone, we anticipate reaching the vast majority of first-time applicants and target households.

Site Location Advantages

An agency owned facility, CA's **permanent enrollment** site at **4906 W. Fond Du Lac Ave. (53216)** is the most central location in this zone and is located within the three highest application areas by zip code. The location also provides ample parking in a private lot. Three years ago CA processed over 9,000 applications at the site alone with no marketing efforts to speak of.

Community Advocates has a 10 year history of enrolling residents on the fixed income list from this location. The facility provides 10,000 sq. ft. dedicated to energy assistance enrollment and services only. This location is especially convenient for clients who have appointment and walk-ins. As this zone also contains the highest vulnerable populations, Enrollment Specialists will focus heavily on mail/phone applications as will they will in all other zones.

Woodlands [flexible mobile site] Woodlands (53224), a 500+ condominium complex that is located on the northwest border of Zone 1, will provide access to their ADA community resource room during rent collection times and during peak season. As tenants arrive to pay their rent, they have the convenience of enrolling at the time and at the same location. Woodlands will distribute outreach information and enrollment schedules to their tenants in their regular communications.

Westlawn [flexible mobile site] (53218) Housing Authority of the City of Milwaukee (HACM) owns and manages Westlawn, formerly Wisconsin's largest public housing development. First developed in the 1950s, the 75-acre development on Milwaukee's northwest side has provided critical affordable housing and is now being revitalized for 21st century

housing and community needs. Community Advocates will set up an enrollment site in their offices during rent collection times and during peak season. As tenants arrive to pay their rent, they have the convenience of enrolling at the time and at the same location. HACM will distribute outreach information and enrollment schedules to their tenants in their regular communications.

Berrada Properties [flexible mobile site] In **53223** and **53225** Berrada owns the majority of affordable apartment units in these zip codes. Community Advocates will partner with them to set up enrollment sites at rent collection time and, during peak season, they will include flyers when they mail resident's rent slips.

Library Branches and other supportive entities [**satellite sites**] Many libraries, childcare facilities and shopping areas in Zone 1 have agreed to conduct outreach during non-peak seasons.

Off-site and additional efforts

Community Advocates will provide additional outreach to target groups by encouraging mail and telephone applications and make specialized accommodations to ensure enrollment:

- Schedule home visits and mail phone apps during nonpeak season
- Send information to eligible households informing them they can expect a call from an assigned and named Enrollment Specialist to help them complete a mail or telephone application

On March 1, 2015, an outreach report revealed that 10,000 of the 21,000 households with no payment history during the winter months wait until after March 1 to come in to apply for crisis and energy assistance. Community Advocates plans to ramp up staffing in this Zone from March –May 15 to meet the demand.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines.

Zone 2

Zip	Number of Applications	Outreach Opportunity	High Application Area	Percent of Total App	Portion of Budget
53206	4968	High	Yes		
53209	6430	Med	Yes		
53211	421	High			
53212	3558	High	Yes		
53217	243				
ALL	15620			23%	\$ 511,168

Site Location Advantages

CA's permanent enrollment site at **4906 W. Fond Du Lac Ave.** is will serve as the primary **permanent site** for Zone 2 as it adjoins zip codes 53206 and 53209. The site will actually provide continuity of service as many Zone 2 households already are familiar with the location and services. All Zone 2 zip code residents can access a bus line directly to the Fond du Lac location. Use of this facility will also result in decreased costs by not duplicating a heavily-used and effective site.

MOU partner, **HACM** owns and/or manages 1,000 subsidized units in three housing complexes in this zone. Community Advocates will operate **flexible mobile sites** at the HACM properties that will follow schedules to coincide with tenant certifications and resident meetings. Again the convenience of Community Advocates flexible siting can encourage and increase enrollment of eligible households.

Heartland Housing's Maskani Place [satellite site] 320 E. Center Street (53212) Community Advocates currently conducts outreach activities at this 37 unit site and proposes to provide a **flexible mobile site** and continue outreach in the next contract period.

Library Branches and Community Centers [flexible mobile sites] in (53212) Community Advocates currently conducts outreach programs in these locations and will continue efforts in the next contract period. In the past, response has been adequate but there is ample room to increase outreach and use flexible, alternative enrollment siting to attract eligible applicants to a non-threatening and familiar location.

(53211) This is a zip code area in which it is known that many residents are reluctant to enroll at a social services agency because of the stigma attached. For this reason, a permanent or even a regularly scheduled site is not warranted.

Even though this zip code has the second highest vulnerable population, "asking for help" or receiving benefits is a situation that must remain private. CA will blanket this zip code with mailed and posted information encouraging residents to use the mail or telephone application process. Home visits can serve as follow-ups and private enrollment opportunities. A number of large apartment buildings are located on the east side and would be prime locations for **flexible mobile site** enrollments.

Off-site and additional efforts

- 8,000 of the 15,620 eligible households apply within the last two month of the energy season.
- Therefore, during non-peak time, energy assistance staff will concentrate on mail/telephone applications.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines.

Zone 3

	Number of	Outreach	Area	Total App	Portion of Budget
53213	438	High			
53214	1902	Med			
53219	1592				
53226	267				
53227	774	Med			
ALL	4973			7%	\$ 155,573

Site Location Advantages

Community Advocates will maintain a **permanent enrollment site** in the **West Allis City Hall 7525 W. Greenfield (53214)**. The site will maintain regular hours that are convenient to the majority of local applicants. The site will welcome all customers, those with appointments, stand-bys and walk-ins. This zip code was the highest trafficked zip code in the last contract period but still has the need for additional outreach which CA will conduct in cooperation with the City of West Allis. In addition, the city operated the HPRP (homeless prevention activities) for three years and has an established a congenial relationship with the working poor and low-income individuals.

West Allis Library at 7421 W. National Ave. (53214) and Hales Corners Library at 5885 S. 116th St. (53130) will serve as flexible mobile sites. This level of on-site service is more than adequate to serve those with appointment and walk-ins as the volume is quite low.

Low-income housing (10) and senior sites (throughout West Allis and Hales Corners) Community Advocates currently conducts outreach and enrollment at these sites and proposes to continue throughout the next contract period.

Subsidized Housing and Voucher units (throughout West Allis) Community Advocates has an agreement to work with the City of West Allis, which manages more than 1,000 units, to arrange site visits to help increase enrollment for eligible residents.

Both of the sites noted above may be used as **flexible mobile sites** with hours and times announced well before the site visit. As this zone has a very low rate for missed appointments, CA has determined that the number of proposed sites and levels of service is appropriate to achieving the best enrollment results.

Off-site and additional efforts

- Even though this zone has the second lowest population of individuals and households living below the federal poverty level, there are an increasing number of elderly residents eligible for energy assistance. This group is also averse to admitting need and will most likely never use a walk-in service. This population will be CA's focus for outreach effort, mail and telephone enrollment and will be further targeted for home visits.

- As of March 15, 2400 households had not applied, per the outreach report mentioned previously. Over 70% live in apartment buildings. CA has determined that targeted Outreach will be efficient and effective. There were three trailer parks are home to hundreds of individuals who have yet to apply. Marketing the program and completing applications would be simple for this population by using a **flexible mobile site** operation. CA project that there will be more applications, fewer incomplete applications due to missing information, and residents do not have to travel. CA staff can setup anywhere within minutes as has been proven by our 10 years of experience taking enrollments at senior sites.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 4

Zip Code	Population	Outreach Opportunity	Outreach Available	Percentage of Total Zone	Portion of Budget
53202	481	High			
53203	49	Med			
53204	4344	High	Yes		
53205	1409	High			
53208	3796	Med	Yes		
53215	5207	Med	Yes		
53233	987	High			
ALL	16273			24%	\$ 533,392

Site Location Advantages

Community Advocates will maintain two permanent sites in this zone to meet the heavy demand (three high use zip codes and significant outreach needs) and to provide a convenient location that is experienced and adept at assisting Spanish speaking households.

Community Advocates headquarters [permanent site] at James Lovell St. and Wisconsin Ave. (53233) provides the single most convenient access point for the majority of our clients, and, indeed is accessible to most Milwaukeeans. It is convenient to the only central hub for all Milwaukee County Bus lines. The building is equipped with a large and comfortable waiting room, well-designed offices, private interview rooms, and provides a professional environment that is both welcoming and client-centered. Clients can conveniently combine visits with appointments at the Court House, City Hall, County Services and state and federal offices. Moreover, CA offers private, ample, adjacent parking to our clients at no cost. All of these amenities certainly provide an impetus for clients to choose CA's downtown location for Energy Assistance in addition to the availability of other services.

CA's main offices are located in the heart of Zone 4 at zip 53233, which according Milwaukee statistics is home to the highest percentage of residents at or below the federal poverty level.

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The location is open during all regular business hours and schedules weekend and extended hours during peak season.

The Hunger Task Force has entered into a Memorandum of Understanding with CA to provide a primary **permanent site** in this zone at the **Robles Center 910 W. Historic Mitchell St. (53204)**. Robles Self Service center features enrollment and benefits applications, including food share, medical services, social security benefits and more. The Center is an extremely high-trafficked facility. In addition, Hunger Task Force serves more than 9,000 customers each month through other programs and will advertise Energy Assistance. At this site, Hunger Task Force serves a largely Latino population with a high percentage of households that have never applied for energy assistance and has agreed to market the program widely throughout the zone using materials specifically designed to attract this very underserved population. HTF has Spanish speaking staff available for interpretation. CA will hire bi-lingual and Spanish speaking staff as Enrollment Specialists and Utility Advocates.

Community Advocates began enrollment at Robles two weeks ago and a full 50% of households had not applied. A high percentage of those were also non-English speaking. Advocates noted that clients who had applied in the past had used the Chase location but were very eager to use this location for its convenience. Many recalled the old energy assistance site at 9th St. and Madison which had been the busiest of all sites.

Large SRO (single room occupancy units) and community one-bedroom apartments surround the area. Jomela Properties and HACM own a large portion of the low-income apartments in Zone 4 and CA will work with both groups to finalize outreach plans. In addition to the large-scale Robles Center, CA will work with HACM and Jomela Properties to schedule site visits. Jomela will provide space in its main offices for from the 1-5th when renters come in to accommodate a **flexible mobile site**. The company will post information and include enrollment information in all tenants' mailed rent slips. CA will work with Jomela to determine appropriate incentives and provide these to first time applicants.

Zone 4 is home to a very high volume of individuals with mental health issues and those who have been chronically homeless (homeless for at least one entire year or four instances of homelessness within a three year timeframe). Even though the formerly homeless may now reside in permanent housing, program awareness is minimal. And many others have never applied due to their mental illness. This area will be best served by these site visits as these individuals and households may need to more "hand holding" and coordinated efforts with apartment building managers.

Off-site and additional efforts

Community Advocates will conduct concentrated outreach efforts as the need in all zip codes is High or Medium. It is imperative that we get the word out and provide the flexible enrollment sites that will augment the large-scale efforts at the Robles Center.

- The Hmong Friendship Association will continue to serve the increasing Hmong population in this area with information, outreach, enrollment services and referrals to Community Advocates.

- Centro Hispano Milwaukee is a CA partner in Zone 4 and will conduct outreach activities targeting their Spanish-speaking households.
- CA is also exploring the dozens of outreach opportunities that exist at back to school festivals, the numerous community centers, daycares, and churches.

All sites and locations have adjacent and ample off-street parking available to help serve clients seeking energy assistance services and have access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 5

Zip Code	Population	Income Level	Area	Area	Area
53129	266	High			
53130	125	High			
53132	403				
53220	987	Med			
53221	1906	Med			
53228	290	Med			
ALL	3977			6%	\$ 133,348

Site Location Advantages

As Zone 5 is the smallest zone and a low volume area. Community Advocates proposes to use targeted outreach mailings and postings encouraging additional mail and telephone applications. Most current recipients in the zone are already familiar with the telephone application process and watch their mail for the postcard. If a **satellite site** is required, it will be limited to one in the 53221 zip code area with a schedule and hours sufficient to cover all in-person enrollments. As in previous contract periods, CA will work with the libraries to schedule appointments and collaborate with the health department to provide energy assistance outreach and marketing materials.

CA will use **flexible mobile sites** as a large number of senior site are located in this area and these clients rarely wait until the last minute. When their postcard arrives, they are prompt in responding and will arrive at their scheduled time or wait for their site visit. CA has an 85% appearance rate for apartment site visits.

However, even though the numbers are low, the outreach opportunities are high in that this population is, once again, reluctant to visit a site that they perceive will mark them as "needy". To date, 745 applications have not been completed in 53221.

Zone 5 is an area saturated with affordable safe housing. Community Advocates will work with local landlords informing them of the benefits to their clients. Energy assistant eligibility and weatherization eligibility is good for both. CA plans to identify additional apartment managers to schedule visits and utilize their offices for marketing.

One of the primary advantages of **flexible mobile sites** is that customer flow is controlled and staff does not have to wait around for customers. They are busy the entire time and staff costs are kept to a minimum. Appointments are scheduled weeks in advance to determine staffing needs. Current sites offer free conference space for energy assistance workers also saving on permanent site costs.

Because enrollment is done in the comfort of a familiar location, clients are much less likely to feel stigmatized. All paperwork is completed on site resulting in very few incomplete applications.

There is little need for more than the available on-street parking and convenient parking lots are attached to the library sites and there is access to Milwaukee County Transit System bus lines. Few parking needs are apparent when operating flexible mobile sites.

Zone 6

Zip	Number of Applications	Outreach Opportunity	Area	Percent of Total App	Portion of Budget
53110	958	Med			
53154	738				
53172	843				
53207	1383				
53235	396	Med			
ALL	4318			6%	\$ 133,348

Site Location Advantages

Robles Center (53204) will serve as the **permanent site** for Zone 6 since the majority of activity in this zone originates within zip code 53207—only 1-5 miles from the Center. Zip code 53204 is directly adjacent to 53207 and is actually closer to targeted client populations than a more central zone 6 site. The balance of Zone 6 will best be serviced by outreach and **flexible mobile sites** due to high appearance rates at apartment complex site visits.

Zone 6, especially zip code area 53207, is predominately Latino and CA's experience indicates that clients prefer a site closer to the areas that they frequent. The other zip codes include substantial elderly and low income housing complexes. Jomela Properties owns and manages many properties in this area and will partner with Community Advocates to provide support and services similar to those described in Zone 4.

Community Advocates currently conducts successful site visits at several senior sites and has established positive relationships that took years to nurture.

There is some need for additional outreach for this area and the availability of the Robles Center fills the need for a stable site that is convenient for individual enrollment. Zone 6 will also benefit from CA's plan to increase postcard notification and scheduled appointments.

There are several libraries in Zone 6 that have been used as temporary sites. CA proposes to set up **flexible mobile sites** in the libraries that are open on days and during hours that are convenient to the clients.

Off-site and additional efforts

As is the case in the Zone 5, there will be a concerted effort to meet the customers "where they live" by partnering with landlords to provide enrollment sites energy while promoting weatherization.

CA's current site is very busy simply because there are fewer options on the near south side where there are the most concentrated areas of poverty and energy assistance recipients. CA will increase post card notification, use **flexible mobile sites**, and explore additional outreach opportunities that exist at numerous community centers, in cooperation with the health department and at churches.

There is little need for more than the available on-street parking and convenient parking lots are attached to the library sites in most of Zone 6. Few parking needs are apparent when operating flexible mobile sites and there is access to Milwaukee County Transit System bus lines. Robles Center has ample parking available for residents of zip code 53207.

Program Operation

The following sections address the Required Program Inputs, Processes, and Program Activities listed in the Program Operation section of the RFP and correspond to the components included in Community Advocates Energy Assistance Program Logic Model. [Please refer to "Logic Model" on page 111.]

Service Sites: The primary year-round, central, full-service location will be located at our main offices in downtown Milwaukee. Community Advocates new headquarters at James Lovell St. and Wisconsin Ave. provides the single most convenient access point for the majority of our clients, and, indeed is accessible by most Milwaukeeans. It is convenient to the only central hub for all Milwaukee County Bus lines. The building is equipped with a large and comfortable waiting room, well-designed offices, private interview rooms, and provides a professional environment that is both welcoming and client-centered. Clients can conveniently combine visits with appointments at the Court House, City Hall, County Services and state and federal offices. Moreover, CA offers private, ample, adjacent parking to our clients at no cost.

Three additional year-round sites will operate in areas that serve Milwaukee's north and south side neighborhoods. Each is completely ADA accessible and provides a professional, client-friendly atmosphere. Free parking for clients is available at both sites and both can be easily accessed using public transportation. All year-round sites will publicize a schedule of evening and weekend hours in addition to normal business hours that will serve clients during peak enrollment seasons and to flexibly accommodate other high volume time periods.

Further, CA plans to operate satellite sites and flexible mobile sites that will provide convenient, flexible hours in neighborhoods most in need of local, evening and weekend service. Sites will be operated on a flexible schedule that best accommodates client needs and will provide staffing that increases or decreases according to demand. Each site is easily accessible and includes free client parking.

All four primary sites are completely ADA accessible and, because of complete compliance with federal law, all library branch satellite sites afford the same or even enhanced accessibility.

Community Advocates Energy Assistance staff will qualify applicants for Weatherization services and provide enrollment information.

Weatherization: Community Advocates Energy Assistance staff will ensure that a client's Energy Assistance enrollment is complete, thus qualifying the client for Weatherization. Weatherization services are available to qualified low-income individuals. Weatherization identifies energy waste and provides cost-effective, energy-saving measures and education to residential households. The energy saving measures and education offered by Weatherization includes but are not limited to: attic, sidewall, and crawl space insulation; air infiltration, heating system, refrigerator, and water heater replacement; duct work and participant education. The services offered result in more energy-efficient, comfortable and safer homes. Community Advocates EA staff will also work in conjunction with local Weatherization agencies to establish potential eligibility of owners of large apartment or assisted living facilities and ensure they are aware of enrollment procedures and weatherization requirements. Community Advocates will continue its ongoing working relationships with Milwaukee's local weatherization operators. Staff will provide clients with information and the name, phone number and address of the local weatherization operator for further service.

Complete and Process Applications

Community Advocates' Enrollment Specialists and Utility Advocates will

- Take applications and assist applicants in completing the Home Energy Plus (HE+) applications
- Accept applications at Community Advocates corporate offices, primary sites or at satellite locations including eligible participants' homes if such accommodations increase ease of access for homebound household and other targeted groups
- Will take applications throughout the year to establish eligibility for Pro-Active Crisis Assistance and Weatherization Assistance after the heating season is over, and for regular energy assistance benefits and emergency assistance during the heating season
- Receive referrals from Milwaukee County Energy Assistance staff for Milwaukee County residents who are potentially eligible for Energy Assistance
- Prepare on-site emergency and regular energy assistance applications for energy consumers at all Community Advocates Energy Assistance sites
- Verify application information and review supporting documents to certify the application is accurate

- Enter all applications into the WHEAP system within 30 days of the application in chronological (date) order assuring applications are complete and resolving application and check issuance problems
- Enter into the WHEAP System within 30 days those applications taken in a multifamily building by the local weatherization program operator to achieve the number of eligible dwelling units needed to make the building eligible for weatherization assistance
- Comply with State guidelines when processing applications from employee relatives and friends

Crisis Assistance

Maintaining energy service is a critical basic need for all households, especially in Wisconsin where winter can bring life threatening temperatures and weather conditions. The State of Wisconsin, local government organizations, and utility providers throughout the State administer programs and regulations designed to assist low-income customers with retaining and obtaining utility services. Even with firmly established programs and services, last year, We Energies had to notify tens of thousands of Milwaukee County households that they were subject to disconnection. Milwaukee County's Energy Assistance Crisis Services helps consumers who are in need and provides services to low-income customers in the Milwaukee area who have had and continue to have difficulty managing household energy costs. This program, administered through Milwaukee County's Management Services Division, was able to assist those customers through case management, thereby helping applicants to obtain aid and maintain their eligibility for further assistance.

The program enables low-income customers to focus on values of affordability, reduction of arrears, energy conservation and financial management.

In 2013-14, even though nearly 25,000 Milwaukee County households received the crisis assistance that is available to low-income customers, this number is only a portion of the households eligible to receive assistance. Energy Assistance - Federal funds, distributed through the State Department of Administration, are made available for low-income customers based on their level of energy use and their income. A combination of higher energy costs and energy use will only contribute to greater need. Increases in the number of families living in poverty will also affect the ability of families to afford energy costs and maintain a consistent payment plan. Any increases in cost of living are certain to have a negative impact on all energy consumers—especially those households relying on low- or fixed-incomes.

More specifically, the target population to be served through the Energy Assistance Outreach Program is Milwaukee County residents who are having challenges maintaining their utility service throughout the year or have experienced an energy crisis within the last 12-18 months. Target populations include the elderly, disabled, non-English speaking households, those with young children, low- and fixed-income households and the working poor residents of Milwaukee County.

To respond to the needs of Milwaukee County's low-income households in need of Crisis Assistance, Community Advocates Energy Assistance Program Utilities Advocates and Enrollment Specialists will provide services that include but are not limited to the following:

- Respond to requests for crisis assistance within 48 hours of receiving the request
- Respond within 18 hours of receiving a request if a situation is life threatening
- Verify household eligibility
- Verify that an Energy Assistance application for the household has been completed
- Provide emergency and pro-active crisis services to assist clients with home energy costs during the heating season.
- Provide pro-active services year-round
- Provide Case Management services
- Facilitate client enrollment in Energy Management workshops
- Provide links to the Low-Income Pilot program and other supportive services.
- Cooperate with the Energy Strategic Planning Committee, CA to develop a "Crisis Plan" to guide in managing funds and distributing benefits and services

Emergency Furnace Services

Community Advocates Energy Assistance Staff will process all requests for WHEAP emergency furnace replacement or repair. Staff is trained to recognize the immediate threat to the health, and even the lives, of those experiencing no-heat situations because of furnace failure. From January 1-February 28, 2014, Community Advocates received furnace service requests from 41 households. Staff is aware of the discretionary nature of this benefit and will use their experience and exercise professionalism when processing requests from eligible clients.

Staff will be responsible for

- Determination of household eligibility
- Determination if services will be provided
- Contacting the local weatherization agency to provide actual repair or replacement services
- Collecting and filing final documents
- Processing invoices

Fraud

Community Advocates Energy Assistance staff will periodically review applications and enrollment data for suspected incidents of fraud. If found, records and supporting data will be provided to CA's Division Director for determination and any suspected cases will be presented to Milwaukee County for follow-through with further action. CA has built-in reviews to prevent fraudulent enrollment and anticipates no cases (or very few) will necessitate such action. Refer to Fraud Hotline Info page 7-3 RFP

Fair Hearings

If the client believes his/her application has been incorrectly denied or his/her payment is incorrect, the client may request a fair hearing. Community Advocates will attempt a resolution of fair hearing complaints prior to a fair hearing occurring. In the event that resolution does not occur, the agency will prepare for and attend the fair hearing as notified by the Wisconsin Department of Administration, Division of Hearing and Appeals or the Milwaukee County Department of Health and Human Services, Management Services Division.

QUALITY ASSURANCE AND OUTCOMES

Quality Assurance Compliance

Community Advocates will conduct internal Quality Assurance review of 10% of all Energy Assistance and furnace program referrals to ensure compliance with WHEAP regulations. Additionally, Community Advocates Energy Assistance Program will cooperate and expedite all monitoring and review of program services to assure Quality Assurance compliance. The Division Director will submit all evaluation reports complete and on time. Participant/client rights, non-discrimination policies and other pertinent State and Federal documents will be posted and displayed as required. On-site program monitors and evaluators will be given prompt convenient access to requested samples of client interviews, survey and questionnaires, case files and any other required documentation. Additionally, CA will provide access to all records covering the agency's organization and management structure, fiscal accountability and verification of service provision.

Current CA Energy Assistance Program Indicators

- Community Advocates completed 16,780 energy assistance applications for the 2013-2014 energy season.
- Community reduced appointment wait times to less than 30 minutes
- Community Advocates continues to provide a large portion of the outreach activities for Milwaukee County:
 - 1611 or 82% of all Alternative Site Applications
 - 203 or 83% of all Home Visits
 - 4200 or 93% of all mail/phone applications
 - In total CA completed 91% of all outreach for Milwaukee County

Required Outcomes

Outcomes

The Expected Outcomes listed in the RFP are as follows:

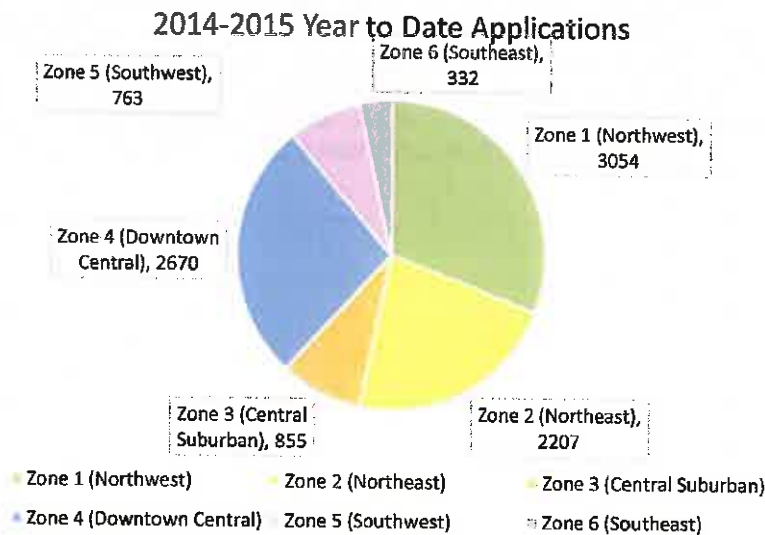
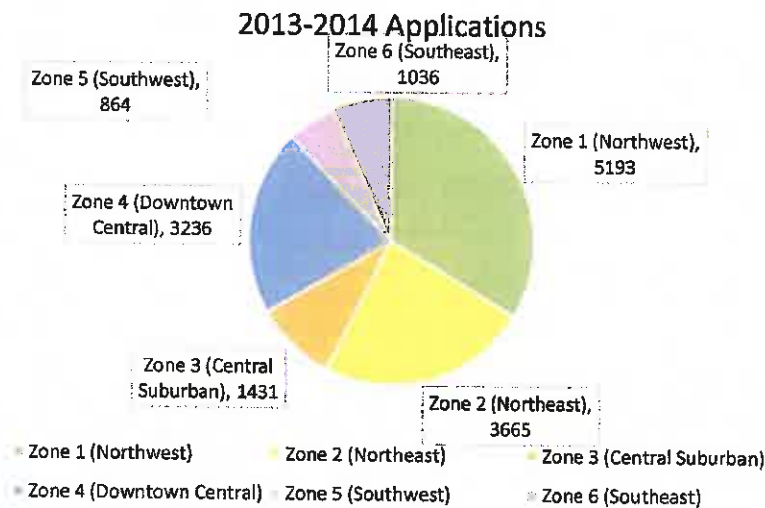
- 100% of all potentially eligible clients have had the opportunity to apply for energy assistance.
- 100% of crisis assistance applicants have been scheduled for an energy training/workshop, in accordance with policy outlined in the Crisis Plan.
- 100% of requests for emergency assistance are responded to within 48 hrs. of receipt.
- 100% of requests made in a life-threatening situation are responded to within 18 hrs. of receipt.
- 100% of cases on the Fixed Income list have had calls for phone applications attempted by the start of the energy season.
- 100% of the senior center/housing sites have been visited and/or scheduled for intake **prior** to the start of the energy season.

Each of the Outcomes above is included in the program Logic Model and is numbered to correspond to the RFP list. All Inputs, Activities, Outputs, Indicators and Projected

Achievements address all required program components. Community Advocates has identified *additional outcomes that will contribute to successful program operation* and these, too, are included in the Logic Model supporting the major program components identified in the RFP. [Please reference the Logic Model on page 111.]

Enrollment Statistics by Zone

The following charts present the number of enrollments Community Advocates Energy Assistance Staff completed in 2013-2014 and current 2014-2015 enrollment numbers. Enrollments are broken out by each of the six service zones as defined by Milwaukee County.



The table following describes Community Advocates' ability to provide similar programs, and the agency's experience in serving the targeted populations. All existing agency programs utilize similarities in service delivery.

Program Name	Funding Period	Fund Source	Program Volume	Target Population	Program Amount	Service Mix
Emergency Assistance	March 2009-10	State of Wisconsin	100 walk-ins daily	Low-income homeless	\$725,000	Assessment/Direct Aid/Case Management
Rapid Rehousing	July 2009-2012	City of Milwaukee	10-20 referral participants daily	Low-income homeless	\$1,900,000	Assessment/Direct Aid/Case Management
Mediation	July 2009-2012	City of Milwaukee	50-60 walk-ins daily	At risk for homelessness	\$1,070,000	Assessment/Direct Aid/Case Management
Energy Assistance	October 2010 – September 2011	Milwaukee County	78 applications daily	Low-income homeless	\$432,000	Assessment/Direct Aid/Case Management
HPRP – West Allis	September 2009 - 2012	City of West Allis	30 households daily	Low-income homeless and At risk for homelessness	\$572,000	Assessment/Direct Aid/Case Management

Each program listed above meets or exceeds its expected client service level and/or projections. These programs were selected not only based on similarities of delivery, but also to indicate CA's ability to professionally administer large dollar contracts. CA administers dozens of smaller contracts for programs that serve similar target populations and include similar service mix.

Agency-wide, Community Advocates now submits approximately 30 proposals for refunding renewal each year. Some are on competitive multi-year cycles; some must be renewed for funding every year. Within the mix of these programs, Community Advocates has been offering several for more than 30 years, while others, added as new programs over the years, have become ongoing hallmarks of the agency's services. For the last five years, Community Advocates rate for available refunding has been 100%, which supports CA's solid reputation for providing successful program management, fiscally responsible administration and client-centered service.

EXPERIENCE ASSESSMENT FOR NEW PROPOSER AGENCY

ITEM #29d

N/A

Community Advocates, Inc. has current contracts with Milwaukee County.

EXPERIENCE ASSESSMENT FOR NEW PROPOSER AGENCY

N/A

Community Advocates, Inc. has current contracts with Milwaukee County.

Program Evaluation: Agencies currently under contract to the DHHS in 2014 must include a copy of the most recent annual or semi-annual program evaluation report for the program currently provided, or, if several programs are being provided, for the program that is the most similar to the service being applied for in this proposal.

Program Evaluation 2013-2014

- Community Advocates completed 16,780 energy assistance applications for the 2013-2014 energy season.
- Community reduced appointment wait times to less than 30 minutes
- Community Advocates continues to provide a large portion of the outreach activities for Milwaukee County:
 - 1611 or 82% of all Alternative Site Applications
 - 203 or 83% of all Home Visits
 - 4200 or 93% of all mail/phone applications
 - In total CA completed 91% of all outreach for Milwaukee County

2015 PROVIDER SERVICE SITE INFORMATION

ITEM #30

Provide a separate sheet for each site location where services are provided.

Agency Name: Community Advocates, Inc.	Site Name: Zone 4 Downtown Central
Site Address: 728 N. James Lovell Street	City/State/Zip: Milwaukee, WI 53233
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

- Basic Needs Division: Housing, Utilities, and Disabilities Services**
- Milwaukee Women's Center Division: Addiction Day Treatment for Women**
- Behavioral Health Division: Permanent Supportive Housing Case Management**
- Public Policy Institute: Poverty Reduction Strategies & Advocacy**

Total number of unduplicated consumers you are presently able to serve at any one time: **4,500 Daily**

Total number of unduplicated consumers you are currently serving: **6,000 Daily**

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

During Peak Energy Season	During Non-Peak Energy Season
7 a.m. – 7 p.m. Monday	11 a.m. – 5 p.m. Monday
7 a.m. – 7 p.m. Tuesday	9 a.m. – 5 p.m. Tuesday
7 a.m. – 7 p.m. Wednesday	9 a.m. – 5 p.m. Wednesday
7 a.m. – 7 p.m. Thursday	9 a.m. – 5 p.m. Thursday
7 a.m. – 7 p.m. Friday	9 a.m. – 4 p.m. Friday
9 a.m. – 1 p.m. Saturday	N/A Saturday
N/A Sunday	N/A Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: **Maudwella Kirkendoll (414) 699.6820**

- Agency owns this Service Site
- Agency leases this Service Site:
 - Expiration date of Lease: _____
 - (lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 1 Northwest
Site Address: 4906 W. Fond du Lac Ave.	City/State/Zip: Milwaukee, WI 53216
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: **N/A**

Total number of unduplicated consumers you are currently serving: **N/A**

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

During Peak Energy Season	During Non-Peak Energy Season
<u>7 a.m. – 7 p.m.</u> Monday	<u>11 a.m. – 5 p.m.</u> Monday
<u>7 a.m. – 7 p.m.</u> Tuesday	<u>9 a.m. – 5 p.m.</u> Tuesday
<u>7 a.m. – 7 p.m.</u> Wednesday	<u>9 a.m. – 5 p.m.</u> Wednesday
<u>7 a.m. – 7 p.m.</u> Thursday	<u>9 a.m. – 5 p.m.</u> Thursday
<u>7 a.m. – 7 p.m.</u> Friday	<u>9 a.m. – 4 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: Maudwella Kirkendoll (414) 699.6820

- Agency owns this Service Site
- Agency leases this Service Site:

Expiration date of Lease: _____
 (lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 4 Downtown Central
Site Address: Robles Center 906 W Historic Mitchell	City/State/Zip: Milwaukee, 53204
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time:
N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

<u>During Peak Energy Season</u>	<u>During Non-Peak Energy Season</u>
<u>9 a.m. – 5 p.m.</u> Monday	<u>9 a.m. – 1 p.m.</u> Monday
<u>9 a.m. – 5 p.m.</u> Tuesday	<u>9 a.m. – 1 p.m.</u> Tuesday
<u>9 a.m. – 5 p.m.</u> Wednesday	<u>9 a.m. – 1 p.m.</u> Wednesday
<u>9 a.m. – 5 p.m.</u> Thursday	<u>9 a.m. – 1 p.m.</u> Thursday
<u>9 a.m. – 5 p.m.</u> Friday	<u>9 a.m. – 1 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

- Emergency Contact Available 24 Hours
- Emergency Number: Maudwella Kirkendoll (414) 699.6820

- Agency owns this Service Site
- Agency leases this Service Site:

Expiration date of Lease: Please see Hunger Task Force MOU
 (lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Zone 3 – Satellite Site
Site Address: West Allis City Hall 7525 W Greenfield	City/State/Zip: West Allis, WI 53214
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: **N/A**

Total number of unduplicated consumers you are currently serving: **N/A**

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program for all programs at this site

<u>During Peak Energy Season</u>	<u>During Non-Peak Energy Season</u>
<u>9 a.m. – 5 p.m.</u> Monday	<u>9 a.m. – 1 p.m.</u> Monday
<u>9 a.m. – 5 p.m.</u> Tuesday	<u>N/A</u> Tuesday
<u>9 a.m. – 5 p.m.</u> Wednesday	<u>9 a.m. – 1 p.m.</u> Wednesday
<u>9 a.m. – 5 p.m.</u> Thursday	<u>N/A</u> Thursday
<u>9 a.m. – 5 p.m.</u> Friday	<u>9 a.m. – 1 p.m.</u> Friday
<u>9 a.m. – 1 p.m.</u> Saturday	<u>N/A</u> Saturday
<u>N/A</u> Sunday	<u>N/A</u> Sunday

Emergency Contact Available 24 Hours
 Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site
 Agency leases this Service Site:

Expiration date of Lease: Please see City of West Allis MOU
 (lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.

Site Name: Flexible Mobile Site - Woodlands

Site Address: 8865 N. Swan Road

City/State/Zip: Milwaukee, WI 53224

Site Contact Person: Maudwella Kirkendoll

Title: Chief Operating Officer

Phone: (414) 270-2969

Email: maudwellak@communityadvocates.net

Fax: (414) 270-2971

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time:
N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

Programs for men Programs for women Programs for men & women

Services for pregnant women

Services for families with children _____ Childcare provided

Services for Persons Involved in the Criminal Justice System

Services for the Developmentally Disabled

Services for the Physically Disabled

Services for persons with co-occurring mental health and substance use disorders

Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

_____ Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see Woodlands MOU

(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site HACM
Site Address: 809 N. Broadway	City/State/Zip: Milwaukee, WI 53202
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

Programs for men Programs for women Programs for men & women

Services for pregnant women

Services for families with children Childcare provided

Services for Persons Involved in the Criminal Justice System

Services for the Developmentally Disabled

Services for the Physically Disabled

Services for persons with co-occurring mental health and substance use disorders

Wheelchair accessible

Hours of operation: for specific program for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see HACM MOU

(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site Jomela Properties
Site Address: 5601 W. North Avenue	City/State/Zip: Milwaukee, WI 53208
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time:
N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

- Programs for men Programs for women Programs for men & women
- Services for pregnant women
- Services for families with children _____ Childcare provided
- Services for Persons Involved in the Criminal Justice System
- Services for the Developmentally Disabled
- Services for the Physically Disabled
- Services for persons with co-occurring mental health and substance use disorders
- Wheelchair accessible

Hours of operation: for specific program _____ for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

_____ Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see Jomela Properties MOU
(lease must extend through the end of the contract year, at minimum)

Agency Name: Community Advocates, Inc.	Site Name: Flexible Mobile Site DHHS Housing Division
Site Address: 600 W. Walnut Street	City/State/Zip: Milwaukee, WI 53208
Site Contact Person: Maudwella Kirkendoll	Title: Chief Operating Officer
Phone: (414) 270-2969	Email: maudwellak@communityadvocates.net
Fax: (414) 270-2971	

Describe differences in programs or services available at this site:

Energy Assistance

Total number of unduplicated consumers you are presently able to serve at any one time: N/A

Total number of unduplicated consumers you are currently serving: N/A

Please check if your agency provides the following at this site:

Programs for men Programs for women Programs for men & women

Services for pregnant women

Services for families with children Childcare provided

Services for Persons Involved in the Criminal Justice System

Services for the Developmentally Disabled

Services for the Physically Disabled

Services for persons with co-occurring mental health and substance use disorders

Wheelchair accessible

Hours of operation: for specific program for all programs at this site

TBD per MOU Monday

TBD per MOU Tuesday

TBD per MOU Wednesday

TBD per MOU Thursday

TBD per MOU Friday

N/A Saturday

N/A Sunday

Emergency Contact Available 24 Hours

Emergency Number: Maudwella Kirkendoll (414) 699.6820

Agency owns this Service Site

Agency leases this Service Site:

Expiration date of Lease: Please see DHHS Housing Division MOU
(lease must extend through the end of the contract year, at minimum)

Item 30 Service Site Certification:

I certify that the **PROVIDER SERVICE SITE INFORMATION** is correct as of the date of proposal submission.

Signed, Andrea Mallmann- Elliott

Name (print) Andrea Mallmann- Elliott

Title Chief Executive Officer

Phone (414) 270-2941

Email andie@communityadvocates.net

RE: Energy Assistance Proposal

Andi Elliott <AndiE@communityadvocates.net>

Tue 3/31/2015 2:19 PM

Inbox

To: Gallegos, Diane <Diane.Gallegos@milwaukeecountywi.gov>;

Cc: Maudwella Kirkendoll <MaudwellaK@communityadvocates.net>;

1 attachment (869 KB)

Item 20 Additional Disclosures.pdf;

Good Afternoon Diane,

Please find attached the required documentation for Item 20 – Additional Disclosures along with the original form. My apologies for the oversight in our initial submission and thank you for allowing us to correct the unintentional omission. Please let me know if there is anything else you need at this time.

Best regards,

Andi

Andi Elliott

Community Advocates, Inc.

414.270.2941, 414.270.2971 Fax, 414.517.6718 Cell

CONFIDENTIALITY NOTICE: This Email is covered by the Electronic Communications Privacy Act, 18 U.S.C. Sections 2510-2521 and is intended only for the use of the individual to whom it is addressed and may contain information that is privileged and confidential. Any and all such rights of privilege, privacy, and non-disclosure are hereby claimed and expressly not waived. If the reader of this message is not the intended recipient or the employee or agent responsible for delivering the message to the intended recipient, you have received this message in error and any review, dissemination, distribution, use, or copying of this message is strictly prohibited. If you have received this message in error, please notify us immediately by e-mail and delete the original message.

From: Gallegos, Diane [mailto:Diane.Gallegos@milwaukeecountywi.gov]

Sent: Tuesday, March 31, 2015 12:52 PM

To: Andi Elliott

Subject: Energy Assistance Proposal

Andi,

We have received your proposal for the Energy Assistance (WHEAP) RFP for Milwaukee County.

<https://outlook.office365.com/owa/>

4/1/2015

After doing an initial review, we have found an issue with the proposal and are allowing you an opportunity to revise this item in your proposal.

Part 1, Item 20 Additional Disclosures

On page 22 of your proposal, you completed and signed the additional disclosures form. Items 1, 3, and 4 were checked yes. These items require a detailed explanation be attached to the form. We could not find documentation of these items within the proposal.

We would like to give you the opportunity to submit

- a. a revised form
- b. a reference to where these items were submitted in the proposal or
- c. a copy of the current form and the required documentation.

You may submit these **documents to me electronically at this email address by noon Friday, April 3, 2015.**

thanks,

Diane Gallegos

Contract Services Coordinator
Wisconsin Home Energy Assistance Program
Milwaukee County
Department of Health and Human Service
1220 W Vliet Street Room 300-039
Milwaukee, WI 53205

Diane.Gallegos@MilwaukeeCountyWI.gov
414-289-5744

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ADDITIONAL DISCLOSURES

ITEM # 20

1. Has your organization or any representative, owner, partner or officer ever failed to perform work awarded or had a contract terminated for failure to perform or for providing unsatisfactory service?

Yes No If yes, on a separate page please provide a detailed explanation.

2. Within the past five (5) years, has your organization or any representative, owner, partner or officer (collectively "your Company") ever been a party to any court or administrative proceedings or disciplinary action, where the violation of any local, state or federal statute, ordinance, rules, regulation, or serious violation of company work rules by your Company was alleged?

Yes No If yes, on a separate page, please provide a detailed explanation outlining the following:

- Date of citation or violation
- Description of violation
- Parties involved
- Current status of citation

3. Within the past 5 years has your organization had any reported findings on an annual independent audit?

Yes No If yes, on a separate page please provide a detailed explanation.

4. Within the past 5 years, has your organization been required to submit a corrective action plan by virtue of review or audit by independent auditor, or any governmental agency or purchaser of services?

Yes No If yes, on a separate page please provide a detailed explanation including if the corrective action has been accepted by the purchasing agency and completely implemented? If not, please explain remaining action required by purchasing agency.

5. Have you, any principals, owners, partners, shareholders, directors, members or officers of your business entity ever been convicted of, or pleaded guilty, or no contest to, a felony, serious or gross misdemeanor, or any crime or municipal violation, involving dishonesty, assault, sexual misconduct or abuse, or abuse of controlled substances or alcohol, or are charges pending against you or any of the above persons for any such crimes by information, indictment or otherwise?

Yes No If yes, on a separate page, please provide a detailed explanation.

Authorized Signature: *Andrea Mallmann-Elliott* Date: March 20th, 2015

Printed Name: Andrea Mallmann-Elliott Title: Chief Executive Officer

Agency: Community Advocates, Inc.

22| Community Advocates, Inc.

RE: 1. *Has your organization or any representative, owner, partner or officer ever failed to perform work awarded or had a contract terminated for failure to perform or for providing unsatisfactory service?*

Milwaukee County DHHS Behavioral Health Division terminated Community Advocates' Crisis Resource Center contract for non-compliance and adherence to DHS 24 requirements and failure to comply with the corrective action plan submitted to BHD.

RE: 3. *Within the past 5 years has your organization had any reported findings on an annual independent audit?*

The following condition was identified in the 2011 Community Advocates, Inc. Consolidated Financial Statements.

Section II: Financial Statement Findings
SIGNIFICANT ADJUSTMENTS (2011-01)

Condition:

Wipfli LLP proposed a number of adjusting journal entries as a result of the year-end audit, which we deem to be significant to the financial statements. It was noted that several significant accounts were not being reconciled or monitored on a regular basis. The lack of effective control over and accountability for funds, property, and other assets indicates a significant deficiency in internal controls.

Effect:

A lack of proper internal controls over critical accounting areas could result in significantly misstated financial statements. As a result of this condition, there is a significant deficiency in internal control.

Recommendation:

Significant account balances should be reconciled and monitored regularly during the year and at year end.

Management's Response:

On October 1, 2011 Community Advocates moved its accounting function from an outside vendor and began recording accounting activity using our own general ledger system and staff. This transition was more difficult than we expected and caused some issues relating to timeliness of reconciliation of accounts.

Once we recognized that all significant accounts are now being reconciled in a timely manner, an outside accounting firm was hired to monitor the reconciliation process. Monthly reconciliations of significant balance sheet accounts are now being completed and reviewed on a time basis.

RE: 4. *Within the past 5 years, has your organization been required to submit a corrective action plan by virtue of review or audit by independent auditor, or any governmental agency or purchaser of services?*

Community Advocates was required to submit a corrective action plan¹ to Milwaukee County DHHS Behavioral Health Division for the Crisis Resource Center (CRC). The CRC contract was terminated failure to comply with the corrective action plan submitted to BHD.

22a| Community Advocates, Inc.

Energy Assistance Proposal

Gallegos, Diane

Tue 3/31/2015 12:52 PM

To: Andi Elliott <AndiE@communityadvocates.net>;

Andi,

We have received your proposal for the Energy Assistance (WHEAP) RFP for Milwaukee County.

After doing an initial review, we have found an issue with the proposal and are allowing you an opportunity to revise this item in your proposal.

Part 1, Item 20 Additional Disclosures

On page 22 of your proposal, you completed and signed the additional disclosures form. Items 1, 3, and 4 were checked yes. These items require a detailed explanation be attached to the form. We could not find documentation of these items within the proposal.

We would like to give you the opportunity to submit

- a. a revised form
- b. a reference to where these items were submitted in the proposal or
- c. a copy of the current form and the required documentation.

You may submit these **documents to me electronically at this email address by noon Friday, April 3, 2015.**

thanks,

Diane Gallegos

Contract Services Coordinator
Wisconsin Home Energy Assistance Program
Milwaukee County
Department of Health and Human Service
1220 W Vliet Street Room 300-039
Milwaukee, WI 53205

Diane.Gallegos@MilwaukeeCountyWI.gov
414-289-5744

