

## RE: Energy Assistance Proposal

Andi Elliott <AndiE@communityadvocates.net>

Tue 3/31/2015 2:19 PM

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.

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.

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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](mailto:Diane.Gallegos@MilwaukeeCountyWI.gov)

414-289-5744

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6/15/2015

## Corrected and Updated Budget Information

Bev Shook <bshook@esiwi.com>

Thu 4/9/2015 4:43 PM

To:Gallegos, Diane <Diane.Gallegos@milwaukeecountywi.gov>;

1 attachment (327 KB)

BudgetForms ESI 492015.zip;

Diane

Attached please find our revised budget for the Milwaukee County RFP Program MSD-001, itemizing Zones 3,5 and 6. In addition, we have sent via Fed Ex for next day delivery, a hard copy of the proposed budget materials. If you could confirm receipt of our budget documents, it will be greatly appreciated. Hopefully we have completed to your department's satisfaction, all the required documentation for a qualified LIHEAP proposal submission.

Please also be advised, as indicated in our narrative outlining our program design, that our revenue and expenses are based on the client services data provided by percentage of caseloads according to individual zones. Further, we have increased our caseload projection by 20% reflecting our past LIHEAP performance outcomes in other areas with similar demographics.

Should you have any questions or require additional information, please do not hesitate to contact us. Again, thank you personally for the exceptional level of support and technical assistance that you and others have provided during this RFP process.

Respectfully,

**Bev Shook**

**Energy Program Support Mgr**

**Human Resources Manager**

Phone (608) 283-7663

Fax (608) 267-8605

[1225 South Park St.](#)

[Madison, WI 53715](#)

[bshook@esiwi.com](mailto:bshook@esiwi.com)

<https://outlook.office365.com/owa/>

6/15/2015

## RE: Energy Assistance Proposal

Barbara McKillop <bmckillop@cr-sdc.org>

Wed 4/1/2015 10:36 AM

To: Gallegos, Diane <Diane.Gallegos@milwaukeecountywi.gov>; George Hinton <ghinton@cr-sdc.org>;

1 attachment (832 KB)

Item 21 and 22 revised.pdf,

Hi Diane

Thanks again for your patience with our hiccups. Attached is the revised items as requested.

If there are any other items you need, please do let us know.

Barbara

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**From:** Gallegos, Diane [mailto:Diane.Gallegos@milwaukeecountywi.gov]

**Sent:** Wednesday, April 01, 2015 8:09 AM

**To:** Barbara McKillop; George Hinton

**Subject:** Re: Energy Assistance Proposal

George,

Thank you for your quick response.

I apologize if I was unclear in my original email. Both the request for the correction and the new form will become part of the final document. Your corrected document is dated prior to my revision request.

The documents originally submitted were signed by Mr. Gerald Randall.  
I realize the date listed was an error.

I was expecting the resubmitted forms to be signed by Mr. Randall and dated when signed. I can accept your signature, if it is within your agency's policies for you to sign on behalf of Mr. Randall on an RFP. However, I do need the form dated with the actual signature date.

thanks

*Diane Gallegos*

Contract Services Coordinator

Wisconsin Home Energy Assistance Program

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6/15/2015

Milwaukee County  
Department of Health and Human Service  
[1220 W Vliet Street Room 300-039](#)  
[Milwaukee, WI 53205](#)

[Diane.Gallegos@MilwaukeeCountyWI.gov](mailto:Diane.Gallegos@MilwaukeeCountyWI.gov)  
414-289-5744

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**From:** Barbara McKillop <[bmckillop@cr-sdc.org](mailto:bmckillop@cr-sdc.org)>  
**Sent:** Tuesday, March 31, 2015 1:54 PM  
**To:** George Hinton; Gallegos, Diane  
**Subject:** RE: Energy Assistance Proposal

Diane  
Attached here are Items 21 and 22 with the corrected dates on the document.

Thanks for allowing us the opportunity to revise these dates and return. Feel free to contact me if you need additional documents.

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**From:** George Hinton  
**Sent:** Tuesday, March 31, 2015 1:50 PM  
**To:** Barbara McKillop  
**Subject:** FW: Energy Assistance Proposal

Please forward date corrected certification to Diane Gallegos.

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**From:** Gallegos, Diane [<mailto:Diane.Gallegos@milwaukeecountywi.gov>]  
**Sent:** Tuesday, March 31, 2015 1:18 PM  
**To:** George Hinton  
**Subject:** Energy Assistance Proposal

George,

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 these items in your proposal.

1. Certification Regarding Compliance with Background Checks. Part 1, Items 21 and 22.

Caregiver background checks are a required element of all Milwaukee County Purchase of Service contracts with DHHS and are monitored annually. The forms submitted are outside of the RFP dates. Please complete and resubmit the forms with a current date.

**You may submit these documents to me electronically at this email address by noon Friday, April 3, 2015 and mail the originals.**

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6/15/2015

thanks

Diane

*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](mailto:Diane.Gallegos@MilwaukeeCountyWI.gov)  
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6/15/2015

## RE: Energy Assistance proposal

Hartmann, Kaye <Kaye.Hartmann@umos.org>

Thu 4/2/2015 3:23 PM

To: Gallegos, Diane <Diane.Gallegos@milwaukeecountywi.gov>;

Cc: Martinez, Leonardo (Jim) <Leonardo.Martinez@umos.org>; Koehn, Tina <Tina.Koehn@umos.org>; Vidas, Daniel <Daniel.Vidas@umos.org>; Shomin, Andrea <Andrea.Shomin@umos.org>;

3 attachments (4 MB)

Item 29c - Experience Assessment for New Proposer Agency (UMOS).pdf; Item 29d - Experience Assessment for New Proposer - Organizational Leadership (UMOS).pdf; UMOS-MSD-2015 BudgetForms 04012015.xls;

Good Afternoon, Diane,

Thanks for your call and providing clarification on the information you requested. Attached please find the following items:

- Completed Item 29c – Experience Assessment for New Proposer Agency
- Completed Item 29d – Experience Assessment for New Proposer Agency – Organizational Leadership (for UMOS CEO, CFO and WHEAP Supervisor)
- Revised Item 27 - linked Budget Forms dated 4/1/15

Please let me know if you need anything else.

*Kaye Hartmann*  
*Planning & Resource Development Director*

Office: (414) 389-6039  
Cell: (414) 550-2406

UMOS, Inc.  
[2701 S. Chase Avenue](#)  
[Milwaukee, WI 53207](#)  
[www.umos.org](http://www.umos.org)

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**From:** Gallegos, Diane [mailto:Diane.Gallegos@milwaukeecountywi.gov]  
**Sent:** Wednesday, April 01, 2015 8:24 AM  
**To:** Hartmann, Kaye  
**Cc:** Martinez, Leonardo (Jim); Koehn, Tina; Vidas, Daniel; Shomin, Andrea  
**Subject:** Re: Energy Assistance proposal

Kaye,

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6/15/2015

thank you for your quick response.  
You may submit the additional items to me electronically.  
Please call me if you have any questions.

Diane

*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](mailto:Diane.Gallegos@MilwaukeeCountyWI.gov)  
414-289-5744

---

**From:** Hartmann, Kaye <[Kaye.Hartmann@umos.org](mailto:Kaye.Hartmann@umos.org)>  
**Sent:** Tuesday, March 31, 2015 9:36 PM  
**To:** Gallegos, Diane  
**Cc:** Martinez, Leonardo (Jim); Koehn, Tina; [Daniel.Vidas@umos.org](mailto:Daniel.Vidas@umos.org); Shomin, Andrea  
**Subject:** Energy Assistance proposal

Dear Diane,

Thank you for contacting us regarding our Energy Assistance proposal submission. We appreciate you allowing us the opportunity to resubmit documents pertaining to Program Experience, Items 29c, 29d, and 29e, about our 2014 DHHS contract. We will certainly get the requested information to you as soon as possible, no later than noon on Friday, April 3<sup>rd</sup>. Please let me know if you would like these documents electronically, in hard copy, or both?

Regarding the budget, our CFO, Dan Vidas, who prepared the budget is out of the office until Monday; however, our Director of Fiscal Services, Andrea Shomin, at [andrea.shomin@umos.org](mailto:andrea.shomin@umos.org), (414) 389-6016, is familiar with the budget and can begin working on the revisions. I have copied both Dan and Andrea on this email so that they have Sumanish Kalia's phone number.

If you have any questions or need any additional information, please do not hesitate to contact me. I will not be in the office the rest of the week but am working remotely and will be monitoring my email closely. You may also reach me on my cell phone, if needed.

*Kaye Hartmann*  
Planning & Resource Development Director

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[2701 S. Chase Avenue](#)  
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6/15/2015



Fax: (414) 389-6047

[www.umos.org](http://www.umos.org)

**From:** Gallegos, Diane [<mailto:Diane.Gallegos@milwaukeecountywi.gov>]

**Sent:** Tuesday, March 31, 2015 12:39 PM

**To:** Martinez, Leonardo (Jlm)

**Subject:** Energy Assistance proposal

Mr. Martinez,

We have received your proposal for the Energy Assistance (WHEAP) RFP for Milwaukee County.

After doing an initial review, we have found 2 issues with the proposal and are allowing you an opportunity to revise these items in your proposal.

1. Program Experience. Part 3, Items 29c, 29d, and 29e.

We have verified your 2014 purchase of service contract with the DHHS CARS Division for the Celebrating Families.

While your submission is technically correct, the document submitted (29e) does not provide detailed information on the program procedures, outcomes, measurements, indicators or achievements required in the DHHS logic model.

We would like to give you the opportunity to submit the Experience Assessment (29c) and Experience Assessment for Agency Leadership (29d) forms. We feel that these forms will allow us to see a better picture of UMOS's ability to administer the Energy Assistance Program.

You may submit these **documents to me electronically at this email address by noon Friday, April 3, 2015.**

2. Budget Forms Part 2, item 27.

There is missing information within the budget forms (such as indirect costs). The missing information does not allow us to evaluate the information provided.

Also, we found an error in the "other non-DHHS revenue" information. In short, your program budget, minus the other revenue sources is making your net request for this program \$0.

We would like to give you the opportunity to revise and resubmit the budget documents. Rather than describing the budget information in this email, I am requesting you send me **the name and contact information of the person that will be working on the revisions by the end of the day.** That person may contact Sumanish Kalia at 414-289-6757 for assistance.

**The revised budget will be due no later than noon, Wednesday, April 8th.**

Please confirm via email or phone if your agency will be submitting these revisions.

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6/15/2015

I have highlighted and bolded the deadlines for you.  
Thank you.  
My contact information is below and in the voicemail I left you.

*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](mailto:Diane.Gallegos@MilwaukeeCountyWI.gov)  
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