



MSD-001
Wisconsin Home Energy Assistance Program (WHEAP)

INTRODUCTION

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	X	Page 1
	Proposal Contents	X	Page 2-3
2	Cover Letter	X	Page 4
Part 1 – AGENCY PROPOSAL			
3	Authorization To File	X	Page 5
4	Agency Description and Assurances	X	Page 6-7
5	Board Of Directors, Owners, Stockholders Demographic Summary	X	Page 8-9
6	Ownership, Independence, and Governance	X	Page 10-44
7	Owners/Officers	X	Page 45
8	Mission Statement	X	Page 46
9	Agency Organizational Chart	X	Page 47
10	Agency Licenses and Certificates	X	Page 48
11	Indemnity, Data And Information, and HIPAA Compliance Statement	X	Page 49
13	Related Organization/Related Party Disclosure	X	Page 50
14	Employee Hours-Related Organization Disclosure	X	Page 51
15	Conflict Of Interest & Prohibited Practices Certification	X	Page 52
16	Equal Employment Opportunity Certificate	X	Page 53
17	Equal Opportunity Policy	X	Page 54
18	Audit Fraud Hotline	X	Page 55
19	Certification Statement Regarding Debarment And Suspension	X	Page 56
20	Additional Disclosures	X	Page 57-65
21	Certification Regarding Compliance With Background Checks – Children & Youth	X	Page 66-68
22	Certification Regarding Compliance With Background Checks - Caregiver	X	Page 69
23	Promotion of Cultural Competence	X	Page 70-72
24	Emergency Management Plan	X	Page 73
Part 2 – BUDGET AND OTHER FINANCIAL INFORMATION			
25	IRS Form 990 For Non-Profit Agencies	X	Page 74
26	Certified Audit/Board Approved Financial Statement	X	Page 75-127
27	Electronic versions of:		Budget
	Form 1 (Program Volume Data)	X	Page 1-87
	Form 2 and 2A	X	
	Form 2B	X	
	Form 3 and 3S (Anticipated Program Expenses)	X	
	Form 4 and 4S (Anticipated Program Revenue)	X	
	Form 5 and 5A	X	
	Form 6-6H	X	

Part 3 –PROGRAM PROPOSAL

Technical Requirements	Item #	Item Description	Proposal	
			Check each Item Included	Page # of Proposal
Part 3 –PROGRAM PROPOSAL				
	28	Program Organizational Chart	X	PP 1
	29a	Program Logic Model	X	PP 2-6
	29b	Program Narrative	X	PP 7-33
	29c	Experience Assessment For Agency	N/A	N/A
	29d	Experience Assessment For Agency Leadership	N/A	N/A
	29e	Most Recent Program Evaluation (Current Contractors)	X	PP 34
	30	Provider Proposal Site Information	X	PP 35-40
	31	Accessibility	X	PP 41
	32	Staffing Plan	X	PP 42-74
	33	Staffing Requirements-	X	PP 75-86
	34	Current Direct Service Provider/Indirect Staff Roster	X	PP 87-89
	36	Client Characteristics Chart-	X	PP 90-96

DCPI	Designation of Confidential and Proprietary Information	N/A	N/A
SDE	Statement of Deviations and Exceptions	N/A	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: *Gerard Randall* Date: March 25, 2015

Printed Name: Gerard Randall Title: Board Chair

Agency: Community Relations-Social Development Commission

Proposers applying for programs up for competitive, panel review must submit all items in the above table (Introduction; Part 1, Agency Proposal; Part 2, Budget and Other Financial Information; and Part 3, Program Proposal).



March 25, 2015

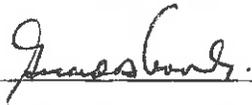
ITEM #2

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,

Authorized Signature:  Date: March 25, 2015

Printed Name: Mr. Gerard Randall Title: SDC Board Chair

Agency: Community Relations- Social Development Commission

MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 4

4041 N. Richards Street • Milwaukee, WI 53212 • P: 414.906.2700 • cr-sdc.org



MSD-001
Wisconsin Home Energy Assistance Program (WHEAP)

PART 1

AGENCY PROPSAL

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

Item #3

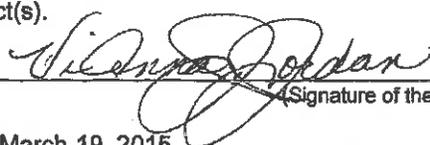
PLEASE NOTE: Proposals cannot be recommended for funding to the Milwaukee County Board until the Authorization to File is completed and received by DHHS Contract Administration.

This is to certify that at the March 19, 2014 meeting of the Board of Directors of Community Relations - Social Development Commission (SDC), the following resolution was introduced by

Vincent Bobot (Board Member's Name), and seconded by
ViAnna Jordan (Board Member's Name), and unanimously approved by the Board:

BE IT RESOLVED, that the Board of Directors of Community Relations - Social Development Commission (SDC) hereby authorizes the filing of a proposal for the Year 2014 Milwaukee County Department of Health and Human Services (DHHS) funding.

In connection therewith, George P. Hinton, CEO is authorized to negotiate with DHHS staff. In accordance with the Bylaws (Article VII Section 7.3) of Community Relations - Social Development Commission (SDC) George P. Hinton, is authorized to sign the Year 2015 Purchase of Service Contract(s).

Name: 
(Signature of the Secretary of the Board of Directors)

Date: March 19, 2015

Printed Name: ViAnna Jordan

YEAR 2015 AGENCY DESCRIPTION AND ASSURANCES

ITEM # 4

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)*
- N/A 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.

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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall Title: SDC Board Chair

Agency: Community Relations-Social Development Commission

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	Handicap
Asian or Pacific Islander			
Black	3	6	
Hispanic	1		
American Indian or Alaskan Native			
White	3	3	
Totals	7	9	

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.

Item 5 Cont'd.

Authorized Signature: Gerard Randall - _____ Date: March 20, 2015

Printed Name: Gerard Randall

Title: Board Chair

Agency: Community Relations-Social Development Commission

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	Office Title	Term	% Owner ship	Amount Distributions/ Dividends (\$)	Compensated? (Yes/No)	Independent? (Yes/No)	Resume Attached
Gerald Randall	Chair	3/2017	N/A	N/A	No	Yes	Yes
Stephanie Findley	Vice Chair	3/2017	N/A	N/A	No	Yes	Yes
Jason Fields	Treasurer	3/2018	N/A	N/A	No	Yes	Yes
ViAnna Jordan	Secretary	4/2016	N/A	N/A	No	Yes	Yes
Alma Ramirez	Member at Large	4/2016	N/A	N/A	No	Yes	Yes
Melanie Cosgrove Holmes	Commissioner	6/2015	N/A	N/A	No	Yes	Yes
Brian Schupper	Commissioner	3/2017	N/A	N/A	No	Yes	Yes
Jim Sullivan	Commissioner	3/2017	N/A	N/A	No	Yes	Yes
Delta Triplett	Commissioner	4/2016	N/A	N/A	No	Yes	Yes
Jo'Mar J. Hooper	Commissioner	3/2017	N/A	N/A	No	Yes	Yes
Vincent Bobot	Commissioner	4/2016	N/A	N/A	No	Yes	Yes
Monique Taylor	Commissioner	4/2016	N/A	N/A	No	Yes	Yes
Dr. Gary L. Williams	Commissioner	3/2017	N/A	N/A	No	Yes	Yes
Dr. Demond Means	Commissioner	4/2016	N/A	N/A	No	Yes	Yes
Sara Van Winkle	Commissioner	3/2017	N/A	N/A	No	Yes	Yes
Erika Steele	Commissioner	3/2017	N/A	N/A	No	Yes	Yes

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 Committees

Committee Name	Committee Purpose
Executive Committee	The Executive Committee recommends the hiring and firing of the CEO, and oversees the performance of the CEO. The Executive Committee is also responsible for conducting routine and ordinary business of the Commission between meetings of the Commission, and for providing guidance and direction to the Commission on all matters related to the development of policies and procedures for the Commission.
Pension Committee	The Pension Committee serves as the trustee for the Commission's Pension Fund and reports twice a year to the Commission on the status of the Pension Fund.
Budget, Finance & Resource Development Committee	<p>The Budget, Finance and Resource Development Committee:</p> <ul style="list-style-type: none"> • recommends to the Commission an annual budget and compensation plan for the agency that incorporates financial information and program/agency outcomes and performance data and recommends fiscal policies and procedures to strengthen the Commission's fiscal responsibility, • oversees, monitors, and reviews the Commission's financial situation to ensure appropriate use of agency resources, including agency budgets and revenues, reporting quarterly to the Commission on the Commission's financial status, including a comparison of actual income and expenditures and budgeted income and expenditures, • designs, recommends, and implements strategies that will improve the capacity of the agency to increase income through contributions of funds, goods, or services from individuals, foundations, and other services, and serves as a catalyst for

	aggressive and effective fund development and for the realization of the agency's potential for income growth as necessary to meet, sustain, and perpetuate its mission and programs.
Program Planning & Public Policy Committee	<p>The Program, Planning and Public Policy Committee:</p> <ul style="list-style-type: none"> • reviews proposals for new programs and services, and with the assistance of the CEO, makes recommendations to the Commission for action on such proposals, • makes suggestions and recommendations to the full board in connection with advocacy issues and public policy matters relating to the mission of the agency, • monitors collaborative efforts between the Commission and other community agencies and organizations to promote efficient delivery of services to members of the community who need them, and • facilitate and sponsor public town hall meetings and open forums to gain community input and feedback about the Commission and its programs.
Audit Committee	The Audit Committee assists the Board of Commissioners in fulfilling oversight of the agency's financial statements, compliance with legal and regulatory requirements, and the performance of the agency's internal audit function and independent auditors.
Human Resource Committee	The Human Resources Committee recommends salary and employee benefits, oversees, monitors, and reviews Commission personnel policies, receives and acts, in accordance with Commission policies, upon grievances of employees of the Commission, and develops and recommends changes where appropriate in agency personnel policies and procedures as needed to ensure qualified persons are employed at the Commission.
Governance Committee	The Governance Committee considers and makes recommendations to the Commission concerning changes in the governance and procedures of the Commission as set forth in the Commission's by-laws and regulations, and develops and implements procedures for the orientation of the full Commission and each individual Commissioner.

The Board of Directors' 2015 meetings for the agency are tentatively scheduled for the following dates:

January 16, 2015	May 15, 2015	September 18, 2015
February 13, 2015	June 19, 2015	October 16, 2015
March 13, 2015	July 17, 2015	November 13, 2015
April 17, 2015	August 2015- In recess	December 18, 2015

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 25, 2015

Printed Name: Gerard Randall Title: Board Chair -

Agency: Community Relations- Social Development Commission

GERARD A. RANDALL, JR.

EDUCATION:

Marquette University; Milwaukee, Wisconsin
B.A., College of Arts and Science
Degree Received, 1975
Dunbar Vocational High School; Chicago, Illinois
Diploma Received, 1971

EMPLOYMENT HISTORY:

Executive Director – Milwaukee Partnership Academy, Milwaukee, WI
2010 - Present

Managing Partner – The Lazarus Group, LLC, Milwaukee, WI
The Lazarus Group, LLC provides expertise to organizations seeking to develop their workforce into more efficient, productive, and cost effective units.
2008 - Present

Senior Fellow – Workforce Development Initiatives
New American Policy Institute, Milwaukee WI
Develop and investigate policies and strategies that affect America's workforce productivity.
2009 - Present

President/CEO – Private Industry Council, a Workforce Development Board, Milwaukee, WI
The Private Industry Council (Currently the Milwaukee Area Workforce Investment Board) is the local administrator for United States Department of Labor programs funding. Its annual budget, in excess of thirty million dollars, assists in the development of the Milwaukee County community workforce.
1998 - 2007

Community Relations Counsel – Milwaukee County Executive's Office, Milwaukee, WI
1995 - 1998

Teacher – Milwaukee Public Schools; Milwaukee, WI
Exceptional Education, 1986 - 1995

AFFILIATIONS AND HONORS:

Cardinal Stritch University - Board of Trustees; Trustee
Milwaukee Public Museum - Board of Directors; Director
New American Policy Institute, Inc. - Board of Directors; Director and Senior Fellow

Milwaukee World Festival, Inc. - Board of Directors; Director
Rite-Wite Family YMCA - Board of Directors; Director
Fresh Coast Basketball Classic - Board of Directors; Director
United Performing Arts Fund - Board of Directors (Former Director)
J.G. Scholarship Fund, Inc. - Board of Directors (Former Director & Vice President)
University of Wisconsin System - Board of Regents (Former Regent & Regent Vice President)
Milwaukee Partnership Academy - Executive Partners (Past Chairman and Founding Director)
America's Black Holocaust Museum - Board of Directors (Former Director)
Public Policy Forum - Board of Directors (Former Director)
VISIT Milwaukee - Board of Directors (Former Director)
30th Street Industrial Corridor Corporation - Board of Directors (Former Director)
Milwaukee Symphony Orchestra - Board of Directors (Former Director)
Very Special Arts - Wisconsin - Board of Directors (Former Director)
Marcus Center for the Performing Arts - Board of Directors (Former Director)
Leaders Forum - Board of Directors (Former and Founding Director)
Milwaukee Community Service Corps - Board of Directors (Former Director)
Girl Scouts of Milwaukee - Board of Directors (Former Director)
Rosalie Manor - Board of Directors (Former Director and Vice President)
Milwaukee Access Telecommunications Authority - Board of Directors (Former Director)
Wild Space Dance Company - Board of Directors (Former Director and President)
Spectrum High School - Board of Directors (Former Director)
St. Aemilian - Board of Directors (Former Director)
Quality Education Commission (Former Commissioner)
Milwaukee Social Development Commission (Former Commissioner)
Governor's Commission on School Violence (Former Commissioner)
Milwaukee Public Schools Task Force on School to Work Initiatives (Past Member)
Milwaukee Public Schools Council on Vocational and Technical Education (Past Member)
Milwaukee County Community of Promise (Past Advisory Council Member)
Friends of the House of Peace (Past Member)
National Council Teachers of Mathematics (Past Member)
Phi Delta Kappa - National Educators Fraternity (Past Member)
Ameritech Teacher Award - Bronze Recipient, 1992 and 1994

STEPHANIE FINDLEY, MSM



Stephanie Findley is the founder and Chief Executive Officer of Midwest Construction & Management Services, LLC a for profit corporation specializing in concrete, painting, drywall, flooring, construction management, etc.

Stephanie's educational background includes a Master of Science in Business Management from the School of Business at Cardinal Stritch University and a Bachelor of Arts degree from Concordia University of Wisconsin in Business Management.

Stephanie has built her career as a management expert with over 15 years of research, public involvement and outreach; political and business strategy experience. She has worked with a wide range of clients using her understanding of individuals, teams and organizations to help leaders and businesses be more successful.

Stephanie has led strategic initiatives with senior management across industries to assess business processes, identify revenue growth opportunities and improve organizational practices. Stephanie provides design and implementation assistance to her clients as they work through changes such as business start ups, acquisitions, reorganizing, growth and continuous improvement projects.

The Wisconsin Department of Transportation is a recipient of her public involvement and outreach experience. Stephanie designed and implemented the "Urban Outreach Initiative" which has been incorporated on all future highway projects surrounding public involvement.

Prior to launching her 2nd business, Stephanie held a number of leadership roles in management with a number of organizations. Stephanie also sits on a number of boards representing the interest of the general community as well as the business community.

She has worked with a wide range of people using her understanding of individuals, teams and organizations to help build the next generation of leaders.



MISSION STATEMENT

"We are elected to help create opportunities for success..."
- Jason Fields

BIOGRAPHY

Born Milwaukee, January 29, 1974; single. Graduate Milwaukee Lutheran H.S. 1992. Former stockbroker; financial advisor, banker. Member: Prince Hall Masonic Lodge No. 4; Alpha Phi Alpha Fraternity, Inc.; Milwaukee Urban League Young Professionals; National Association of Insurance and Financial Advisors; National Association of Black Accountants. Member: Democratic Party of Wisconsin (Inv. Chairman of 4th Congressional District); Milwaukee County Democrats (Inv. 2nd District vice chairman); YPM (Young Professionals of Milwaukee). Elected to Assembly 2004; reelected since 2006.

ACCOLADES

- 2012-Named as one of the Nations Top Pro-Growth Progressive Leaders
- 2012-Wisconsin League of Conservation Award, 2011-2012
- 2012-Brain Injury Association of WI Legislative Achievement Award
- 2012-Black Alliance for Educational Options (BAEO) Champion of Ed Reform Under 40 Award
- 2012-Hispanic Chamber of Commerce Award
- 2012-National Technology Adoption Advisory Council (NTAAC) Midwestern Regional Vice-President
- 2010- Meharry Medical College & State Farm Alliance: *Seat Belt Champion Award.*
- 2009-Wisconsin Minority Supplier Dev. Council *Award of Excellence*
- 2007- Milwaukee Business Journal: *"40 under Forty"*
- 2006- OnMilwaukee.com: *"100 Milwaukeeans you need to know"*.
- 2003- Honorable Mention: Milwaukee Business Journal *"Future Leaders to Watch"*.
- 2002- Recipient of Community Brainstorming Award: *"Ordinary People Doing Extraordinary Things."*
- 2002- Featured in Milwaukee Magazine, September Issue: *"35 Up and Coming Future Leaders"*

CAREER SNAPSHOT

State Representative 11th Assembly District
 2004 to present

Wisconsin Dept. of Financial Institution Committee
 Chairman 2009 – 2010
 Member 2004-present

2011- Midwest Regional Dir. National Technology Adoption Advisory Council.

2010- American Swiss Foundation Young Leaders Conference, Mission to Switzerland.

2008- Global Leaders Training Mission to Israel, Institute for Progressive Leaders.

2007- Chairman of Milwaukee Legislative Caucus.

2006- Emerging Political Leaders - Administrative Fellowship. UW-Madison School of Business

2005 - Bowhay Institute for Legislative Leadership Development Fellowship

KEY SKILLS

- Conflict Resolution
- Leadership & Management
- Highly Motivated
- Articulate
- Advanced Communication Style
- Team Collaboration
- Financial Analysis
- Analytical / Problem Solving Mind Set
- Public Speaking
- Media Interviews and Presentations

PROFESSIONAL EXPERIENCE

Wisconsin State Legislature: 11th Assembly District 2004-Present
As the State Representative of the 11th Assembly district I am expected to become expert in a number of complex subject areas and familiar with a vast array of issues raised by pending legislation. My duties also involve examination and analysis of the State's budget, constituent work, overseeing of public agencies, analysis of government programs, review of major agency rules and review of gubernatorial appointments.

Chairman of the Financial Institutions Committee 2009-2010

MetLife Financial Services 2003-2004

Financial Rep/Agency Director

As a Financial Service Representative with MetLife I acquired 4 insurance licenses, as well as series 6, 7, 63, and 65. I sold all major products offered by MetLife to consumers with "sustainability" always my first priority.

As an Agency Director, I instructed Freshman/Sophomore Representatives on becoming successful Representatives within the MetLife family.

Guardian Credit Union 2003

Branch Manager

- ⊙ Managed staff of eleven tellers, one Assistant Manager and two bank Teller Supervisors.
- ⊙ Responsible for daily operations, developed partnerships with outside organizations, trained staff and scheduled workflow.
- ⊙ Implemented work procedures to make client services more efficient.
- ⊙ Provided business services, financial planning and cash flow analysis for business owners and individuals.

Wells Fargo Bank 2002-2003

Personal Banker

- ⊙ Brought on board by Regional Manager to mount turnaround for this #1 lending bank during expansion. Objective: to promote community relationships with the bank.
- ⊙ Assisted Home Mortgage Branch Managers promote Wells Fargo emerging markets home programs. Responsibilities included selling bank products, maintaining customer satisfaction through problem solving, and assisting small businesses obtain financing through partnership referrals.
- ⊙ Formed a team of individuals from retail, private banking, and commercial departments to perform as business resource for depositors.
- ⊙ Created Leads and planned seminars for Mortgage Branch Managers through my extensive contact list of Pastors, Ministers and clergy.
- ⊙ Operated as liaison between Wells Fargo and YPM Young Professionals of Milwaukee
- ⊙ Proposed six sigma study for local branches to improve customer service

Cayman Island Cuisine 2000-2001

Chief Operations Officer

- ⊙ Duties included managing nine full time staff members.
- ⊙ Began implementation of organizational process to efficiently purchase products and redistribute to four locations with total employee count of 1200.
- ⊙ Developed marketing plan to expand into catering business within two years.
- ⊙ Negotiated with the County of Milwaukee to provide food service to employees working at county locations.
- ⊙ Human resources management. Processed payroll, taxes and budget for the expansion of the business.
- ⊙ Managed to reduce expenses by \$10,000 and increase revenue by \$17,000 the first year.

EDUCATION AND CERTIFICATION

Cardinal Stritch University: Major- Business Management
Expected Graduation Date: Spring 2013
GPA: 3.4
Previously Securities Licensed: 6,7,63,65
Previously Insurance Licensed: Life & Health, Property & Casualty

AFFILIATIONS

Prince Hall Mason, Blazing Star, Lodge #4
Alpha Phi Alpha Fraternity, Incorporated
National Association of Black Accountants
Milwaukee Urban League Young Professionals
National Association of Investment Advisors
National Association for the Advancement of Colored People (NAACP)

References Provided Upon Request

ViAnna J. Jordan

Professional Experience

2010 – 2009 United Methodist Church, 2008 Flood Recovery Program – Milwaukee, WI; Case Manager – Gather, assess, refer and present client information to Unmet Needs Committee. Assist Wisconsin residents who suffered damages in summer storms of 2008 recover from losses and create client a disaster recovery plan.

2007 - 1987 United States Army; Computer Systems: Analyst, Maintainer, Operator, Instructor

2007 - 2005 Milwaukee, Wisconsin; - Military Entrance Processing Station Worked in a joint command processing essential paperwork required for all Wisconsinites and individuals from neighboring states who voluntarily entered the armed forces.

2004 - 2001 - Ft. Gordon, GA Instructor - Taught A+, N+, TCPIP and Computer Systems Security to Advanced Individual Training soldiers entering the army who chose a military occupational skill would in the computer field.

2003 Iraqi War; Served Under 3rd Army Forces Command - C3 Information Management Division out of Ft. McPherson, Georgia; Supervised 6 soldiers with the mission: set up, train and maintain computer battle systems and their applications for a war time head quarters command center, serving top echelon under a joint command which included all branches of military.

2001 - 1999 - Izmir, Turkey; North Atlantic Treaty Organization

(NATO) Support and maintain top secret computer network for NATO users.

1999 - 1997 - Ft. Belvoir, Virginia; Land Information Warfare Activity (LIWA) Platoon Sergeant of 50 soldiers while directly supervising 7 subordinates. Developed and maintained a new, state of the art, top secret information center where the goal was to couple cutting edge technology with military intelligence.

1997 - 1994 - Naples, Italy; North Atlantic Treaty Organization (NATO); Repair and maintain top secret computer systems.

1994 - 1990 - Ft. McPherson, Georgia; Directorate of Information Management; Repair and maintain all top secret computer systems on entire post.

1991 - 1990 - Yong San (Seoul), Korea; 201st Signal Support Battalion Repaired and maintained top secret computer systems throughout the entire country of South Korea.

1990 - 1989 - Ft. Bliss, Texas; 1st Support Battalion Supported Adjutant General soldiers by maintaining and repairing their computer systems; solely responsible for upkeep and maintenance of the Tactical Army Combat Computer System.

1989 - 1987 - Ft. Gordon, Georgia; Advanced Individual Training (AIT) Attended AIT and earned military occupational skill - computer maintenance and hardware basic electronics course.

1987 - Ft. Jackson, South Carolina; Basic Training - Learned survival skills necessary to be a soldier.

* **Granted a Top Secret Clearance with Secret Compartmentalized Investigation in 1989 and maintained clearance throughout military career.**

Education

Indiana University Bachelor of Science - 1984; Bloomington, Indiana

St. John Cathedral High School Diploma - 1975; Milwaukee,
Wisconsin

Harambee Community School Diploma - 1971; Milwaukee,
Wisconsin

Alma L. Ramirez
RESUME

EDUCATION

- Marquette University Milwaukee, WI
 - December 2004 - Bachelor of Arts
 - Major: Criminology and Law Studies
 - Minor: Political Science

- St. Thomas More High School Milwaukee, WI
 - June 2000 – High School Diploma

EMPLOYMENT EXPERIENCE

Community Advocates Milwaukee, WI

Justice 2000 Municipal Court Alternatives Program
Team Leader, February 2007–Present

- Review service plans to ensure client needs are addressed, appropriate goals are identified, and regular appointments are scheduled.
- Participate in peer case staffing and service plan reviews.
- Meet with the case management team on a regular basis to discuss difficult clients, community resources, general office issues, training needs and other issues that develop
- Document quality assurance and staffing activity in the program database.
- Ensure effective and efficient operation of daily program activities in the absence of the program director and service coordinator.
- Create and implement a program training procedure for new staff and student interns.
- Ensure that current policies and procedures are documented in the program Training Manual.
- Oversee the training of new staff and student interns
- Oversee and coordinate the completion of special projects.
- Provide case management services and manage an average case load of 25-30 clients.

Justice 2000

Municipal Court Alternatives Program

Milwaukee, WI

Case Manager, September 2005 - February 2007

- Provide services to defendants in the Milwaukee Municipal Court who are at risk of incarceration.
- Conduct interviews to assess financial, social, clinical, and criminal situations in order to determine the needs of defendants and appropriate alternatives to incarceration.
- Perform court appearances to provide recommendations of alternatives to incarceration for defendants.
- Create service plans to meet client needs and monitor participation in community service, mental health and/or AODA treatment.
- Complete referrals for client services as needed.
- Prepare written reports notifying the court of the client's compliance/non-compliance status.
- Maintain accurate and verified records in the client database that document all case management activity.
- Collaborate with community agencies to connect clients with needed referrals.

Associated Bank Milwaukee, WI

Customer Service Representative, March 2003 - September 2005

- Provided account maintenance services to customers.

- Responsibilities included: processing customer account transactions, maintaining accurate cash balancing records, and answering customer inquiries.
- 2004 – Awarded the Associated Bank Excellence Award for customer service and accuracy.

US Bank (formerly Firststar Bank) Milwaukee, WI
Teller/Personal Banker, April 2001 – March 2003

- Provided account management services to customers.
- Responsibilities balancing records, and answering customer inquiries. As a personal banker, responsibilities also included: processing customer account transactions, maintaining accurate cash responsible for opening new accounts, researching account errors, filing, tracking sales reports, and general customer service.

INTERNSHIP

State of Wisconsin Office of the Public Defender

Milwaukee, WI

Client Services Intern – Trial Division, September 2002 - December 2002

- Assisted public defenders with criminal court cases
- Responsibilities included: interviewing defendants and family members, acquiring medical, school, and court records, submitting reports for court, and communicating with various social service agencies.

MELANIE COSGROVE HOLMES

Executive Summary

A hands-on senior executive with proven ability to provide proactive leadership in utilizing corporate resources to deliver products and services that contribute to client satisfaction, employee satisfaction and business growth. Internationally recognized authority in the contemporary world of work and accomplished public speaker.

Areas of Expertise

- Strategic Planning and Execution
- Creative Product Development
- Business Process Re-Engineering
- Staff Management and Development
- Team Building and Leadership
- Communications – Both Written and Verbal

Professional Experience

ManpowerGroup, Milwaukee, WI 1/82 to the present
Publicly-owned, \$22 billion global workforce solutions company

Played a key role in contributing to ManpowerGroup's steady growth while shaping the staffing industry.

Vice President, World of Work Solutions 1/06 to the present

Vice President, Business Operations Support Group 8/96 to 1/06

Vice President, Customer Services 1/94 to 8/96

Vice President, Product/Program Development 8/88 to 1/94

Director, Special Projects 1/82 to 8/86

Achievement Highlights

- Consistently and successfully managed large teams.
- Developed and implemented a revolutionary training program that has trained over nine million temporary employees to use automated equipment.
- Developed an efficient and effective way to train ManpowerGroup's temporary workforce on quality and workplace issues.
- Developed and maintained a state-of-the-art intake process for ManpowerGroup's associates.
- Adapted the ISO 9000 standard to the staffing industry and achieved registration for the 1100 North American offices.

Melanie Cosgrove Holmes

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- Managed the workforce development efforts where ManpowerGroup partners with public (including the U.S. Department of Labor) and private organizations to train and employ under- and un-employed individuals.
- Managed the diversity and Inclusion efforts where ManpowerGroup partners with NGOs for access to diverse candidates.
- Manages community investment where ManpowerGroup consciously and intentionally gives time, talent and treasure back to the communities we serve.
- Directs the ManpowerGroup Foundation.
- Successful and popular blogger (manpowergroupblogs.us/contemporary-working).
- Public speaker and media spokesperson on subjects including the changing world of work, global trends, the talent mismatch, generations at work, the aging workforce, workforce development, community involvement, corporate social responsibility and quality.

Other Work Experience

Clerical Temporary Employee, ManpowerGroup, Milwaukee, WI	11/81 to 1/82
Special Agent, Northwestern Mutual, Milwaukee, WI	1/81 to 11/81
Specialist, Educational and Training Division, Northwestern Mutual Headquarters, Milwaukee, WI	1/79 to 12/80
Assistant to the General Agent, Northwestern Mutual, New Orleans, LA	1975 to 1979
Various positions at Tulane University Alumni Association, New Orleans, LA	1971 to 1975

Education and Training

MBA, Kellogg School of Management, Northwestern University	12/05
Executive Leadership Programme at INSEAD, Fontainebleau, France	11/02
Strategic Leadership Series at the Lubar School of Business, University of Wisconsin – Milwaukee	9/02 to 5/03
Attended Tulane University	1/71 to 5/74
Attended the University of Mississippi	9/68 to 5/70

Community Involvement

- Chair of the Board, Milwaukee Area Technical College
- Board Member, the Milwaukee Urban League
- Board Member, COA Youth and Family Centers
- Board Member, the Milwaukee Area Workforce Investment Board
- Advisory Council Member, University of Wisconsin – Milwaukee School of Continuing Education Center for the Study of the Workplace

Melanie Cosgrove Holmes

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Brian Schupper

Fifteen years of community development, policy research and analysis, strategic planning, fundraising and leadership cultivation at premiere, internationally recognized non-profit organizations

Creatively energize and partner with board members and organizational leaders to successfully achieve objectives

Led or played an integral role in raising more than \$180 million to date

ACHIEVEMENTS

STRATEGIC PLANNING AND EXECUTION

- Lead GMC County Task Force strategic planning, including analysis of structural challenges and solutions; manage consultant relationships and synthesize information. Contribute to public relations and communications strategies.
- Create and implement economic development plan for regional water cluster.
- Creative partner on development of art, design and technology regional cluster.
- Developed and implemented recommendations and strategies for UW-Milwaukee and Greater Milwaukee Committee to form partnerships with the Israeli water technology cluster; created strategic partnership guidelines and model agreement for GMC
- Initiated and managed study identifying community challenges and opportunities; developed 30 three-year strategic goals toward donor upgrade, prospect cultivation and heightened organizational penetration in community; implemented action steps resulting in 75% of goals achieved within 18 months
- Initiated and oversaw merger of programs to engage next generation of communal leadership, resulting in hundreds of highly committed present and future community leaders

LEADERSHIP AND COMMUNITY DEVELOPMENT

- Developed emerging leaders, many of whom have been recognized by prestigious community awards and moved on to highest levels of organizational leadership
- Worked directly with UW-Milwaukee Chancellor and Greater Milwaukee Committee President to plan, implement and lead a "water track" as part of Governor Doyle's state trade mission to Israel, focused on developing relationships with leading international water technology educational institutions and businesses
- Manage governmental and communal relationships for multiple GMC projects; leverage relationships to achieve common goals and advance communal agendas
- Serve as GMC representative on multiple city, state and regional boards and committees
- Completed nine-month Future Milwaukee leadership development program through Marquette University
- Escorted, cultivated and secured gifts from more than 100 community leaders on 11 local, national and international missions and lobbying sessions
- Initiated, planned and executed as many as 30 engagement, cultivation and fundraising events each year, ranging from 15 to 300 participants, including creation of customized group meetings with high net worth prospects
- Selected as one of 15 leaders for nationwide pilot program to identify, recruit and mentor future communal service professionals

FUNDRAISING

- Managed and implemented multiple key aspects of \$31.1 million annual campaign plans, leading to successive increases in dollars raised and 1,000+ new local donors
- Worked with donor family to close \$1 million restricted gift supporting all local education programs for five-year period
- Successfully led three \$4 million campaign segments, surpassing goal each year, including cultivation of 104 new \$5000 donors and 33 new \$10,000 donors. Campaign growth averaged 7.5% from 3,250 donors, 14% for gifts under \$10,000.
- Managed all details of premiere annual national event at the John F. Kennedy Center, with 2400+ community leaders in attendance and \$750,000+ raised

EXPERIENCE

Greater Milwaukee Committee, Milwaukee, WI: Assist in implementation and management of agency strategic goals and objectives; research and analysis regarding issues of concern to the GMC; interface with key strategic partners, manage external research projects, manage and leverage governmental and community partnerships. On "loan" to Milwaukee Water Council to create and implement Economic Development plan.

- Director of Policy (March, 2010-present)

Schupper Consulting LLC, Milwaukee, WI: Consultant for UW-Milwaukee and the GMC to create partnerships between Milwaukee and Israeli water technology businesses and educational institutions. Representative on Governor Doyle's WI Trade Mission to Israel in November 2009.

- President (September, 2009-March, 2010)

Anti-Defamation League, Washington, DC: World's foremost organization fighting anti-Semitism and all forms of hatred through education, protection of civil rights and building bridges with diverse groups across the community

- Director of Development, Washington DC Region (2006-2009)

Jewish Community Federation of Cleveland, Cleveland, OH: Umbrella fundraising organization for 15 local agencies and four international partners, widely recognized as pre-eminent Federation among 157 peer organizations

- Director of Campaign Strategic Planning (2005-06), Assistant Campaign Director (2004-06), Director of Women's Division (2002-06), Director of Young Leadership Division (2000-02)

Darrell Friedman Institute, Baltimore, MD: One of six higher education institutions nationwide dedicated to training non-profit professionals with a focus on the Jewish community

- National Co-chair of Alumni Fundraising Campaign (2004-2006)

United Jewish Communities, Nationwide: Umbrella organization representing all local Jewish communities in North America, raising \$1 billion annually for domestic and international social services

- National Recruitment Corps (2003-2006), National Education and Engagement Task Force (2002-06)
- Published "Engaging the Next Generation: Challenges and Promises" in *Agenda: Jewish Education*

EDUCATION

Continuing Education

- Future Milwaukee (2010-11), Marquette University
- Advancing Manager Certificate Program (2005-06), Case Western Reserve University School of Management
- Senior Fundraiser Skills: Relationship-Based Fundraising (August, 2005), United Jewish Communities

Graduate Degrees

- M.A. Policy Sciences (2009), University of Maryland, Baltimore County
Thesis: "The American Jewish Influence on U.S. Foreign Policy Toward Iran"
- M.A. Jewish Studies (2006), Baltimore Hebrew University
Honors: Silberman Prize (top graduate thesis); Federation Executive Recruitment & Education Program Scholar

Undergraduate Degree

- B.A. History (1995), Johns Hopkins University; Honors Thesis: "Sports, the Media and American Identity"

CURRENT BOARDS and COMMITTEES

- Competitive Wisconsin (CWI)
- Milwaukee Forum
- Milwaukee Gateway Acropolis Corporation
- Milwaukee Jewish Federation
- Milwaukee Jewish Community Relations Council
- Social Development Commission

JAMES SULLIVAN

EXPERIENCE

DIRECTOR, MILWAUKEE COUNTY CHILD SUPPORT SERVICES

2011-present. Responsible for leadership and management operations of a 130-employee Child Support Agency with 126,000 cases.

WISCONSIN STATE SENATOR, Madison, WI 2007-2011

- Represented 160,000 residents of Milwaukee and Waukesha counties.
- Chairman, Committee on Banking, Military affairs, Biotechnology, and Financial Institutions.
- Co-Chair, Joint Committee on Audit; Vice Chair, Committee on Judiciary and Corrections.
- Drafted and passed over 20 separate pieces of legislation through an advocacy based process, interacting with political, business, and judicial leadership.
- Worked with bi-partisan effort in both legislative houses, developing strong reputation for partnership and team building across political divides to pass key legislation, including Research & Development tax credits for Wisconsin manufacturers.
- Author of Individual Retirement Account reform and modernization law.
- Author of comprehensive payday lending reform regulation, working with both advocacy groups and business to balance consumer protection and economic vitality.
- Senate author of the most sweeping Drunk Driving legislation in over 20 years.
- Author of Health Care Cost Transparency Act, a comprehensive reform allowing greater disclosure of health care costs to help reduce expense and better inform patients. Built a broad coalition of support among both political parties, providers, insurers, and advocacy groups.
- Managed constituent services for 160,000 residents and directed office staff of 5, maintained state office budgets, oversaw dozens of interns, and exercised hiring/firing responsibilities.

LAW OFFICES OF JAMES SULLIVAN, Wauwatosa, WI

Principal, 2007-2011

- Represent clients in civil and probate litigation in Milwaukee circuit courts.
- General law practice representing individuals and businesses in tort, contract, and probate matters.

ALDERMAN, City of Wauwatosa, WI

2000-2007

- Actively involved with municipal planning and development.
- Participated in staff hiring and employee contracting.
- Member, Board of Public Health.

FOLEY & LARDNER, Milwaukee, WI

Associate, 2001-2003

Law Clerk, 1997-2001

- Associate in regulatory health law practice.
- Responsibilities included contract review and drafting, regulatory compliance for physicians and hospitals, and assistance with complex litigation.

Delta L. Triplett

Executive Search and Diversity Management Consultant

Proven ability to improve diversity hires, in middle management to senior level management positions.

PROFESSIONAL ATTRIBUTES

- Strong communication skills, proven ability at commanding the attention of the target audience.
- High level of proficiency with recruiting technologies (ATS, social media) and able to evolve those tools as technology changes.
- Consultative recruiting skills; able to build connections and long-term relationships internally and externally, focus on strong leadership and client management.
- Collaborates across HR COEs to strengthen organizational capability (e.g. works with L & D on interview training, works with Compensation on changes to market values of jobs, etc.).
- Provides guidance and general oversight of the selection process; register certification, composition and practices of interviewer panels, testing, final candidate selection, background checks, drug screens, and offer letters.
- Supports an enterprise diversity and inclusion strategy, by linking Affirmative Action plan execution with key business strategies to strengthen recruitment, retention and progression for key demographic groups.
- Intercultural competency (ability to work within a multi-national, multi-ethnic, multi-lingual organization).
- Demonstrable history of recruiting talent that "sticks" in his or her respective organization.

PROFESSIONAL EXPERIENCES

July 06 to Present

The Ten Group

Milwaukee, WI

Principal/Diversity Consultant

- Strong ability to design, development, and implement the company's strategic plan, for increasing presence in targeted market segments.
- Establish the corporate goals and objectives; and the detail course of action by which they will be achieved.
- Designed and developed custom-tailored diversity recruitment and consultative services to meet the needs and specifications of the clients.
- Established relationships with corporate and community leaders to ensure, The Ten Group, as the "vendor of choice" for diversity management and recruiting initiatives to generate a prospective client lists.
- Motivational speaker, focus on educating organizations on the value of corporate diversity especially in communities where they conduct business and its impact to their bottom line.
- Established and grew clients list to include Johnson Controls, Kohl's Corporate, Quarles & Brady LLP, Foley & Lardner LLP, Veolia Water, Alliant Energy, We Energies, Cooper Power Systems and Aurora Healthcare.

February 10 to November 10

The Ten Group

Milwaukee, WI

Executive Search Partner (Contract)

Client: Johnson Controls

- Selected as the Executive Search Partner for Johnson Controls Corporate office, to evaluate and identify competent candidates for middle management to Senior Director level positions, which involved C-Suite collaborative partnerships.
- Consulted with senior leadership as a "trusted advisor" concerning diversity management talent acquisition and talent developmental strategies.
- Recognized as a "thought leader" and "go to person" for diversity talent acquisition, retention, and implementation of inclusionary practices.
- Exceeded departmental goals, by increasing diversity hires by 66%, with a time to fill rate of 39 days.
- Achieved 75% improvement rate, in middle management to senior level diversity hires.
- Increased diversity hires for women in middle management to senior level positions by 25%.

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- Collaborated with HR Business Partners to create and streamline an effective recruitment processes.
- Integrated the proprietary “comprehensive profile tool” (CPT) to create metrics and processes to increase knowledge base of internal customers, resulting in an increased hire rate.

October 08 to October 09 **Quarles & Brady LLP** **Milwaukee, WI**

Diversity Recruiting Manager

- Responsible for developing, implementing, and monitoring the firm’s internal diversity recruitment program.
- Developed diversity consultative services for Client Services Teams, to assist clients in meeting their diversity goals.
- Responsible for building the Quarles & Brady brand from a diversity perspective as the community relations representative.
- Led the firm’s efforts to develop a supplier diversity program and build inroads into potential clients from a business development and community partnership perspective.
- Created avenue’s that put Quarles & Brady LLP on the national diversity stage, with a critical pipeline of diverse talents and stakeholders.
- Direct all efforts for college relations in developing spring programs by building relationship with university leadership, student groups, and firm alumni; to establish Quarles & Brady as a “firm of choice” amongst top tier colleges and universities.
- Created a partnership with Harvard Law School Student Services, to establish the first Diversity Blog for law firms within their institution.

August 06 to June 07 **The Ten Group** **Milwaukee, WI**

Executive Recruitment Consultant (Contract)

Client: Kohl’s Corporate

- Responsible for full life cycle recruitment of senior level IT professionals.
- Filled 42 senior levels, IT positions over a 9 month period with an average time to fill rate of 37 days.
- Maintained a 91% offer to acceptance ratio.
- Drastically, increased diversity recruitment efforts by filling 71% of the 42 positions with diverse hires.
- Created matrix data tables to help streamline recruitment processes and correlate information.

February 06 to June 06 **The Ten Group** **Milwaukee, WI**

Engineering Recruiting Manager (Contract)

Client: Cooper Power Systems

- Developed matrix score sheet to rate candidates and provide hiring managers an overview of candidate profiles.
- Worked to build rapport with hiring managers to gain the “trust factor” needed within the recruitment process to decrease cycle time.
- Responsible for developing job requirements and creating scoping sessions with the client, to better understand their needs.
- Collaborated with hiring managers, to create innovative recruitment strategies that increased passive candidate flow.
- Developed recruitment processes to decrease cycle time by enhancing technological resources, driving efficiency matrix and increasing accessibility of recruitment sources.

June 05 to February 06 **NuVision Entertainment** **Milwaukee, WI**

Talent Management Consultant (Contract)

- Responsible for developing relationships with key stakeholders in the entertainment business to create opportunities for client exposure in multiple media outlets.
- Negotiated contractual agreements which resulted in long term deals for artists.
- Accountable for financial management and advisory decisions, based on client’s need and former spending tendencies.
- Managed all logistical requirements for client in relation to travel, security, accommodations, and required fees.

- Represented client at the 2005 Stellar Awards and the 2005 Christian Comedy Conference as a panel speaker on; Artist Management and Development.

July 04 to June 05

General Electric

Milwaukee, WI

Recruiter/Diversity Consultant (Contract)

- Member of the diversity committee responsible for designing, developing, and implementing diversity initiatives that are holistic in approach yet defined in their objectives.
- Responsible for creating the diversity recruitment plan for GE-Infrastructure designed to meet the client's needs, utilizing best practice methodology.
- Sourced, screened and interviewed candidates for open positions through various channels, including internal position responses, transfers, employee referrals, internet advertisements, search firms, direct recruiting, and customer specific proprietary databases.
- Interacted with internal staff to conduct recruitment needs analysis, presented qualified candidates, and review recruiting results; utilize a database management staffing metrics to track and monitor all recruitment activities.
- Created best practice methods that tailored metric processes to improve recruiter efficiency and succession rates.
- Developed and implemented new recruiter orientation training on recruitment processes and workflow.
- Trained new recruitment staff on the utilization of Brassring and Hiresystems for applicant tracking and requisition management.

EDUCATION

Bachelor of Arts, Afro-American Studies May 1998
 (Emphasis in Societal Issues)
 University of Wisconsin-Madison
 Madison, WI

Resume
Joe'Mar J. Hooper

PROFESSIONAL EXPERIENCE

Legislative Fiscal Manager

April 2012-Present

October 2010-December 2011

City of Milwaukee Department of Administration- Intergovernmental Relations Division

- Conducted lobbying activities at various levels of government to advance the Mayor's legislative agenda. Assisted in the development of the City's state and federal legislative agendas.
- Led program development and special projects for the Department of Administration.
- Liaison with the Budget Office to identify opportunities to improve the city's fiscal capacity through state or federal legislative changes.
- Worked under the City's Budget Director to identify challenges and opportunities related to the City's budget through research that leads to initiative development and organization change.
- Analyze legislation and research local, state, and federal policy to inform the Mayor's Office and Common Council. Prepare testimony for and write letters on behalf of the Mayor.

Deputy City Treasurer

December 2011- April 2012

City of Milwaukee Office of the City Treasurer

- Directed the collection of property taxes and fees levied for the City of Milwaukee and other taxing jurisdictions within the City of Milwaukee which totaled over \$783 million in 2011.
- Directed the management and investment of all city funds not needed for immediate obligations. City investment funds have an average daily balance of \$213 million.
- Oversaw the banking and treasury management relationships for the City.
- Oversaw the enforcement of delinquent tax collections and the foreclosure of delinquent properties.
- Oversaw a staff of 30 regular term and 30 temporary staff members.

Budget Manager

January 2008- October 2010

City of Milwaukee Department of City Development

- Responsible for the development and administration of the annual operating capital, and grants budgets for the Department of City Development (DCD), Redevelopment Authority (RACM), and Neighborhood Improvement Development Corporation (NIDC).
- Responsible for setting and enforcing administrative and fiscal policies throughout the department.
- Responsible for the budgeting and administration of the department's CDBG and HOME funds.
- Oversaw the completion of various portions of the annual fiscal audits of RACM and NIDC.
- Developed and implemented a new investment policy and program for the Redevelopment Authority's excess funds
- Directly managed budget and accounting staff of three accountants. Indirectly manage the 18 members of the Finance and Administration Division of DC in the absence of the director.

Budget and Policy Specialist

February 2006- January 2008

City of Milwaukee Department of Administration-Budget and Management Division

- Responsible for research, development, and presentation of the city's annual budget including the city operating, capital, and grant budgets.

- Responsible for research, development, and presentation of the city's annual budget including the city operating, capital, and grant budgets.
- Assigned to various departments including the Housing Authority, Department of City Development, Assessor's Office, Milwaukee Public Library, City Clerk's Office, and Milwaukee Area Workforce Investment Board.
- Completed research and analysis for program development at the request of the Mayor, Budget Director, and Director of Administration.
- Responsible for Analysis of information, program evaluation, and preparation of presentations for monthly department performance accountability meetings with the Mayor.

Executive Budget and Policy Analyst

June 2005- February 2006

State of Wisconsin Department of Administration

- Provided budget advice and analysis to help state agencies and the Governor in their deliberations on state resource allocation during the preparation of the biennial budget.
- Provide policy, fiscal, and administrative analysis of proposed, pending and passed legislation to aid in the Governor's legislative functions and recommend whether or not legislation should be vetoed or signed.
- Prepared budget and policy analysis in order to aid the Governor in his deliberations on major state policy directions.
- Monitored the budgets of the Departments of Commerce, Tourism, Financial Institutions, and the Wisconsin Housing and Economic Development Authority.

Economic Development Specialist

December 2004- June 2005

Wisconsin Housing and Economic Development Authority (WHEDA)

- Responsible for public outreach and education about WHEDA's economic development programs through community meetings, public speeches, and training with lenders and businesses.
- Responsible for the review, processing, and underwriting of WHEDA's economic development program applications

BOARDS, MEMBERSHIPS, AND HONORS:

- Community Relations-Social Development Commission- Board Member and Treasurer (12/12-Present.
- Certificate of investing public funds.
- Guest lecturer on budget and Finance at UWM Nonprofit Management Class (2009, 2010, 2011).

EDUCATION

University of Wisconsin-Milwaukee

- Masters of Public Administration- May 22, 2005
- Bachelors of Arts in Secondary Education- May 11, 2003

HONORS

- Vice President of UWM Public Administration Student Society (PASS).
- Graduated Magna Cum Laude.

Vincent J. Babot

Biography and Resuma

- * Born 1952, Milwaukee, Wisconsin
- * Married 38 years to wife, Linda
- * Father of one daughter, Bonnie
- * Graduate of Pulaski High School, 1970
- * In 1971, entered the Milwaukee Police Department as a Police Aide
- * In 1974, promoted to the rank of Police Officer
- * In 1976, shot in the line of duty during an armed robbery in the City of Milwaukee
- * In 1977, named police officer of the year by the Wisconsin Law Enforcement Officers Association
- * In 1982, promoted to the rank of Sergeant of Police
- * In 1992, promoted to the rank of Lieutenant of Police
- * Numerous awards and honors during service as a police officer; Class "C" citation for Outstanding Service, 1976; Purple Heart recipient, 1976; 28 separate Meritorious Arrests for crimes; such as, burglary, armed robbery and murder. In the 28 arrests, 69 suspects were taken into custody.
- * Graduate of University of Wisconsin - Milwaukee, Bachelor of Science degree, 1978
- * Graduate of Marquette University Law School, Juris Doctorate, 1992
- * In 1993, appointed to the position of Assistant City Attorney with the City of Milwaukee.
(Prosecuted municipal ordinance violations for one year. Legal counsel for the Housing Authority of the City of Milwaukee and the Milwaukee Public Library system for five years.)
- * On August 3, 1999 appointed to Municipal Court judge in the City of Milwaukee.
- * Elected in April, 2000 to fill the remainder of the term. Elected to a four year term in April, 2001.

- * Received judicial training certification in traffic law at the Judicial College in Reno, Nevada.
- * Member of the faculty staff for the Wisconsin Municipal Judges Association. Involved in conducting training sessions for municipal and circuit judges in traffic law.
- * Accomplishments as a Municipal Court Judge:

Appointed as Chief Judge of the Milwaukee Municipal Court. During last two years as a Municipal Judge, the court's operating budget was less than the preceding year while the overall revenue increased.

Instituted night court sessions whereby citizens could attend court in the evening to avoid missing work or school.

Community Court Initiative - Participated in a program where the Milwaukee Municipal Court collaborated with the Private Industry Council to conduct nightly court sessions in the community.

Driver's License Reinstatement Program - Developed a program where the Milwaukee Municipal judges went into the community and provided a detailed and specific plan to citizens on how to reinstate their driving privileges in the State of Wisconsin.

Youth Development Boot Camp - Collaborated with retired Marine Corp. soldiers to provide a "boot camp" training program for youthful offenders.

Tax Intercept Program - Spearheaded an initiative enabling the Milwaukee Municipal Court to intercept tax refunds to satisfy delinquent judgments.

Monthly Payment Plan - Instituted a program where defendants could pay 25% of their unpaid fines then enter into a monthly payment plan to satisfy their outstanding judgments.

The Milwaukee Municipal Court received the 2003 Innovative Award for Large Governments by the Public Policy Forum. (This was the first award received by the Milwaukee Municipal Court for outstanding performance.)

August, 2003 - resigned judgeship to run for Mayor of the city of Milwaukee.

April, 2004 to January, 2005 - practiced law in the private sector.

January, 2005 to May, 2008 - Returned to the position of Assistant City Attorney with the Milwaukee City Attorney's Office. (Involved in the development and implementation of the Community Prosecution program combating nuisance properties in the City of Milwaukee). Served as Legal Counsel for the

Department of Neighborhood Services.

May, 2008 - Retired from employment with the City of Milwaukee.

May, 2008 to Present - Private practice as an attorney.

May, 2008 to Present - Consultant for the City of Green Bay regarding community prosecution. Also, presently developing a training program for the City of Racine regarding community prosecution.

Community Service

Pro Bono legal work for the Wilson Park Little League Association since 1993.

Southside Scholarship Foundation

Teen Challenge of Wisconsin

St. Joseph's Foundation

13th District Neighborhood Association

Teen mentor for the YMCA

Monique Taylor
Employee Retirement Specialist

Monique Taylor is a Human Resource Professional with 8 years of experience in the Human Resource field. Milwaukee County currently employs me as a Retirement Specialist in the Human Resources Department located at the County Courthouse. Assisted salaried and non-salaried leaders in administering a wide scope of HR functions related to performance management, retirement planning, benefit administration, wage administration, State and Federal regulatory compliance, staffing, recruitment and retention.

Specialties
Human Resources Management

Experience

Employees' Retirement Specialist , Milwaukee County

Government Agency; 5001-10,000 employees; Government Administration industry

March 2009 – Present

- Commute off-site to facilitate countywide monthly/annual Pension Board Meetings and quarterly Pre-Retirement Seminars.
- Skilled at building networks and cultivating relationships with a broad range of Directors, County Supervisors, Trustees, the County Executive, and others.
- Manage the Milwaukee County Pension Board which consists of nine members - three members appointed by the County Executive, two members appointed by County Board Chairman, three employee members elected by the employee participants and one employee member elected by retired participants.
- Process accurate pension estimates, workflows, and other retirement processing within our pension administration system for retirees, accidental, ordinary or survivor members.
- Manage over 7,500 retirees within our pension administration system – V3 (product of Vitech Systems Group).
- Passionate participant of the Milwaukee County Diversity Committee.
- Milwaukee County Employee Elected Pension Board Member (Trustee)
- Provide daily consulting on retiree related issues.
- Positive community and governmental relationships.

Human Resource Recruitment Coordinator , CH2M HILL

Privately Held; 10,001+ employees; Civil Engineering industry

April 2007 – May 2008

Human Resource Coordinator , Adecco

Public Company; 10,001+ employees; ADEN; Staffing and Recruiting industry

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March 2005 – March 2007

Harley Davidson/ Human Resource Assistant , Spherion

Public Company; 10,001+ employees; SFN; Staffing and Recruiting industry

March 2003 – May 2005

Education

Concordia University-Wisconsin , BA, Human Resource Management
2005 – 2009

Wharton School, University of Pennsylvania

CURRICULUM VITAE

1.0 Gary L. Williams, Ph.D.
School of Education
Department of Educational Policy and Community Studies
University of Wisconsin-Milwaukee
Appointment Type: 12 month
Faculty Rank: Clinical Assistant Professor

2.0 GENERAL INFORMATION

2.1 Formal Education

2.1.1 Ph.D. - Urban Social Institutions 1991
University of Wisconsin-Milwaukee
Dissertation: *The Black Professional in Milwaukee:
A Descriptive Analysis*

2.1.2 Master of Arts - Political Science 1977
University of Wisconsin-Milwaukee
Thesis: *Impact of Type of Release on Recidivism*

2.1.3 Bachelor of Science - Sociology and Political Science 1975
University of Wisconsin-Milwaukee

2.2 Significant Continuing Education

2.2.1 Association of School District Administrators (WASDA,
WASB and AWSA) Joint Educator Effectiveness Conference
on Wisconsin Act 10 (Madison, WI) August 2012

2.2.2 Wisconsin Association of School Boards Leadership Conference
July 2012 (LaCrosse, WI)

2.2.3 Certification from Professional Development Plan PI Quality of Educator
Initiative from Department of Public Instruction (DPI) 2010

2.2.4 Cultures and Communities Summer Faculty Institute Summer 2006

2.2.5 Faculty College UW-Rock County Summer 2006

2.2.6 Train the Trainers - Diversity and Coalition Building in Times
of Crisis, 4/2004 (Washington, D.C.)

2.2.7 Training Programs – UWM School of Continuing Education
Sept – Nov 2004 (8.4 CEUs)

2.3 Academic and Professional Positions Held

2.3.1 Clinical Assistant Professor, University of Wisconsin-
Milwaukee School of Education, Department of
Educational Policy & Community Studies 2005-Present

2.3.2 Director, Institute for Intercultural Research (IIR)
University of Wisconsin-Milwaukee, 2002-Present

2.3.3 Director of Multicultural Affairs
University of Wisconsin-Milwaukee 2003-2005

2.3.4 Assistant to the Vice Chancellor, Division of Student Affairs
University of Wisconsin-Milwaukee 2002-2003

2.3.5 Executive Director
Student Academic Development & Multicultural Affairs
University of Wisconsin-Milwaukee 2000-2002

2.3.6 Deputy Assistant Chancellor, Student and Multicultural Affairs
University of Wisconsin-Milwaukee 1999-2000

2.3.7 Assistant Vice Chancellor, Academic and Multicultural Affairs
University of Wisconsin-Milwaukee 1994-1999

2.3.8 Special Assistant to the Provost/Vice Chancellor and to
the Assistant Chancellor of Student Affairs, University of
Wisconsin-Milwaukee 1992-1994

2.3.9 Administrative Associate University of Wisconsin System
Madison, Wisconsin Summer 1992

2.3.10 Lecturer, Milwaukee Area Technical College 1991

2.3.11 Instructor, University of Wisconsin-Milwaukee College of
Letters and Science, Department of Africology 1988-1991
and 1997-2005

2.3.12 Director, Student Support Services
Department of Learning Skills and Educational Opportunity
University of Wisconsin-Milwaukee 1981-1992

2

Biography

Demond A. Means, Ed.D

Dr. Demond A. Means currently serves as Superintendent of Schools for the Mequon-Thiensville School District, having been appointed to the position in 2007. The Mequon-Thiensville School District is consistently ranked as one of Wisconsin's top public school districts. Under Dr. Means' leadership, the school district has improved its academic performance as an organization and has received numerous awards for being a high achieving school district.

Dr. Means began his career in 1994 as a social studies teacher, coach and advisor at Homestead High School in the Mequon-Thiensville School District. He quickly realized that his passion for school-wide leadership would steer him out of the classroom—where he had established himself as a promising young teacher—and into school administration. Dr. Means quickly moved through the ranks of educational administration serving as an Assistant Superintendent, Co-Interim Superintendent of Schools, Director of Human Resources, Principal, and Assistant Principal.

In December of 2010, Dr. Means was appointed by former Governor James Doyle to serve as a representative for the state of Wisconsin on the Education Commission of the States, a national educational policy consortium. Although the Mequon-Thiensville School District is high achieving in the aggregate, Dr. Means has appropriately pointed out the need to focus on the achievement gap in the district. To that end, Dr. Means, along with his fellow suburban superintendents, established a Closing the Achievement Gap Task Force.

Dr. Demond Means earned his doctoral degree in Educational Leadership from Cardinal Stritch University in 2005, Master's degree in Educational Leadership from Cardinal Stritch University in 1997 and his Bachelors of Arts degree from Concordia University of Wisconsin in 1994.

Current Non-Profit Board Positions:

- Milwaukee Public Museum
- Milwaukee Recre Mission
- American Heart Association – Metropolitan Milwaukee

Professional Association Board Positions:

- Education Commission of the States
- American Association of School Administrators Governing Board Member



SARA VAN WINKLE

1739 North 49th Street
Milwaukee, Wisconsin 53208
414.731.6664
saravn@shcglobal.net

EDUCATION

University of Michigan - A.B. English Language and Literature, cum laude
James B. Angel Scholar, English Honors Program, Merit Board

University of Wisconsin-Madison, School of Law - J.D.
Wisconsin Law Alumni Award

University of Wisconsin-Madison, School of Journalism and Mass Communication
Coursework complete for M.A. in Journalism

EMPLOYMENT

Consultant/Writer, Selfert & Associates, S.C., 2012 - 2013
Legal research, writing, and strategy. State and Federal levels, multiple jurisdictions.

Independent Legal Scholar/Writer-Contributor, Oxford University Press, 2004-05
Scholar/Contributor to 2nd edition of "History of Black Women in America"; research and published entries for encyclopedia of history of African American women in the legal profession, contributions of African American women throughout history of the civil rights movement.

Executive Director, West North Avenue Business Association, Milwaukee, WI, 1998 - 2001
Economic development, community organizing, public relations for targeted business district.

Attorney-at-Law, Law Office of Seymour Pikofsky, S.C., 1992 - 1998
Associate in general practice/litigation firm. Sole responsibility for legal research/writing, and appellate practice for 5-member firm; circuit, state, and federal levels.

Law Clerk, to the Hon. Neal P. Nottesheim (retired), Wisconsin Court of Appeals, 1990 - 1992
Researched and wrote opinions of the court on wide range of legal issues.

Technical Writer, University of Michigan Medical School

Erica Steele, HCCW Director of Latino Empowerment Biography:

HCCW Director of Latino Empowerment, Erica Steele is a graduate of University of Wisconsin-Madison. Erica graduated with degrees in International Studies, Spanish and Latin American, Caribbean and Iberian studies. Erica loves to travel and has been to more than a dozen countries; with extended stays in Argentina and Egypt. Distinguished by a her high energy and interactive style, Erica has created, directed and lead educational and training programs such as Empowering Latinos and the HCCW Advanced Manufacturing Welder Training Initiative at the Hispanic Chamber of Commerce-Wisconsin. Erica's passionate civic leadership is dedicated to community advancement and development through education, training and connecting individuals and their skills to community resources and others to form mutually beneficial relationships and strategic partnerships. Since the creation of Empowering Latinos in 2011, the program has inspired success in hundreds volunteers and adult participants year after year through mentoring and goal-oriented learning. More recently, the HCCW Advanced Manufacturing Welder Initiative has served dozens of low-to-moderate income individuals to develop new professional and technical skills and enter successful careers in the welding industry. In her spare time, Erica is often found enjoying Latino community events involving dance, music or the arts throughout Milwaukee. Erica believes you can't start a work day without salsa music and takes her recreation seriously, too, learning new Latin dance steps to Salsa, Bachata, and Cumbia in weekly dance classes.

YEAR 2015 AGENCY OWNERS/STOCKHOLDERS/OFFICERS

ITEM # 7

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 (\$)*
All Officers of the Commission	<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)	Officer Commissioners	0%	\$0	\$0
All Non-Officer Commissioners	<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)	Non-officer Commissioners	0%	\$0	\$0
George P. Hinton	<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)	CEO	0%	\$0	\$147,499.87/ annual
	<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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall Title: Board Chair

Agency: Community Relations - Social Development Commission

Item 8 comprises the points scored under Mission

YEAR 2015 AGENCY MISSION STATEMENT

ITEM # 8

Agency: Community Relations-Social Development Commission

Submit your agency's Mission Statement. Explain how it aligns with the Division or Program's stated mission, values or goals.



The mission of the SDC is empowering Milwaukee County residents with the resources to move beyond poverty.

To meet the agency's mission, SDC staff works to connect low income families, households, and individuals to effective resources that make an impact on their economic status and quality of life. Our operation of more than 20 poverty reduction programs and services provide low-income families with an integrated approach. This fits well into the goals of the Wisconsin Energy Assistance Program which provide assistance for heating costs, electric costs, and energy crisis situations.

AGENCY ORGANIZATIONAL CHART

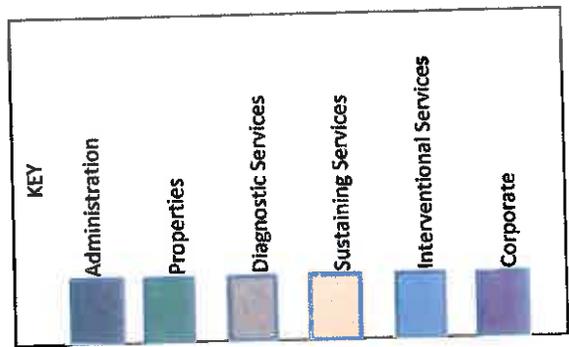
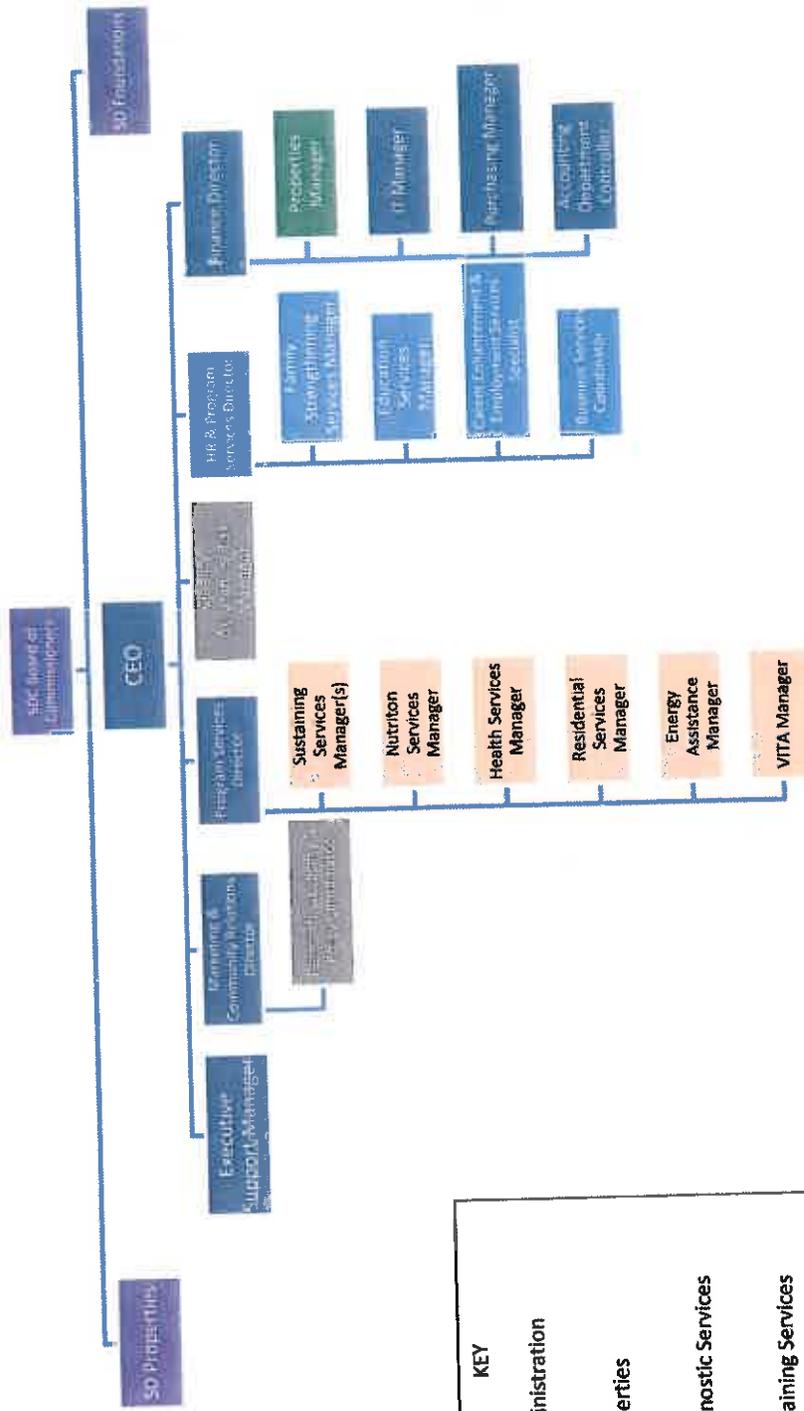
ITEM #9

Submit an organizational chart of the agency detailing each major department or program.

See Agency Organization Chart on the following Page



2015 Organizational Structure



AGENCY LICENSES AND CERTIFICATIONS

ITEM # 10

Submit a copy of each agency license or certificate required to provide the service for which you are requesting funds and copies of any notices of noncompliance or restrictions.

Agency licenses and certifications do not apply for the Energy Assistance program which the Community Relations-Social Development Commission is applying for here.

YEAR 2015 INDEMNITY, DATA & INFORMATION SYSTEMS COMPLIANCE, HIPAA**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.

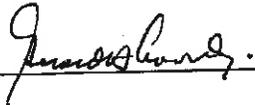
Contractor shall indemnify and save County harmless from any award of damages and costs against County for any action based on U.S. patent or copyright infringement regarding computer programs involved in the performance of the tasks and services covered by this agreement.

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 25, 2015

Printed Name: Gerard Randall

Title: Board Chair

Agency: Community Relations-Social Development Commission

YEAR 2015 RELATED PARTY DISCLOSURES

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
Non-Applicable			

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

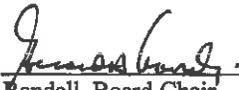
Related Party Relationships

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
Non-Applicable		

Authorized Signature:  Date: March 25, 2015
 Printed Name: Gerard Randall, Board Chair
 Agency: Community Relations- Social Development Commission

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
Non-Applicable			

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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall
 Title: Board Chair
 Agency: Community Relations-Social Development Commission

YEAR 2014 CONFLICTS OF INTEREST AND PROHIBITED PRACTICES

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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall

Title: Board Chair

Agency: Community Relations- Social Development Commission

YEAR 2015 EQUAL EMPLOYMENT OPPORTUNITY CERTIFICATE FOR MILWAUKEE COUNTY CONTRACTS ITEM # 16

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

VENDOR certifies that it will not discriminate against any employee or applicant for employment because of race, color, national origin, sex, age or handicap 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.

VENDOR 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

VENDOR 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 handicapped 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.

VENDOR 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

VENDOR 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

VENDOR 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

VENDOR 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].

VENDOR 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 and the years covered: Feb 1, 2014 to Jan 31, 2015. Updates on current plan are being completed by external contractor to be completed and filed by June 1, 2015.

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

Employees

Community Relations Social Development Commission certifies that it has 141 employees in the Standard Metropolitan Statistical Area (Counties of Milwaukee, Waukesha, Ozaukee and Washington, Wisconsin) and (No. of Employees) 141 employees in total.

Compliance

VENDOR 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 25th day of March 2015 by: Community Relations - Social Development Commission

By Gerard Randall
Gerard Randall
Board Chair

Address: 4041 N. Richards Street
City/State/Zip: Milwaukee WI 53212

YEAR 2015 EQUAL OPPORTUNITY POLICY

ITEM # 17

Community Relations- Social Development Commission (SDC) 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 SDC 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, 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, 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.

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

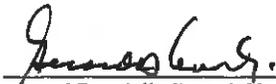
SERVICE DELIVERY - CIVIL RIGHTS

It is the official policy of SDC 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. SDC 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 SDC 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, SDC has designated an Equal Opportunity Coordinator. Any perceived discrimination issues regarding employment or service delivery shall be discussed with Ms. Pamela Biagui, HR Director. Ms. Biagui may be reached during week days at 414-976-2709.

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.



Gerard Randall, Board Chair

March 25, 2014
Date:

This Policy Statement shall be posted in a conspicuous location.



MILWAUKEE COUNTY GOVERNMENT

H O T L I N E

Ph: (414) 93-FRAUD – Fax: (414) 223-1895
(933-7283)

Writer: Audit Hotline- 2711 W. Wells St., 9th Floor, Milwaukee, WI 53208
Website: my.execpc.com/~milcaud

A service of the Milwaukee County Comptroller's Office

For Reporting:

- Incidents of fraud or waste in County government
- Concerns over inefficient Milwaukee County government operations

CALLERS NOT REQUIRED TO IDENTIFY THEMSELVES

----- Other Numbers -----

Milwaukee County:		Sheriff's Department -	
Aging - Elder Abuse Helpline	414-289-6876	Community Against Pushers	414-273-2020
Child Support - TIPS Hotline	414-278-8222	(Anonymous Drug Reporting)	
Child Support - TIPS Hotline	414-278-8222	Guns Hotline	414-278-4867
District Attorney -		State of Wisconsin:	
Consumer Fraud Unit	414-278-4646	Child Abuse or Neglect Referrals	414-220-7233
Public Integrity Unit	414-278-4645	DOJ Consumer Protection Unit	1-800-998-0700
Mental Health		Wisconsin W-2 Fraud Hotline	1-877-865-3432
Crisis Hotline	414-257-7222	Wisconsin Child Care Fraud	1-877-302-3728
Crisis Hotline (TTY/TDD)	414-257-6300	Legislative Audit Bureau Hotline	1-877-372-8317
City of Milwaukee:		Federal:	
Fraud Hotline	414-286-3440	Medicare Fraud	1-800-447-8477
		Social Security Fraud	1-800-269-0271
		Federal Funds Fraud (FraudNet)	1-800-424-5454

(7/12)

Audit Services Division Hotline

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: *Gerard Randall* Date: March 25, 2015

Printed Name: Gerard Randall Title: Board Chair

Agency: Community Relations-Social Development Commission

CERTIFICATION REGARDING 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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall
 Title: Board Chair
 Agency: Community Relations-Social Development Commission

ADDITIONAL DISCLOSURES

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: Gerard Randall Date: March 25, 2015

Printed Name: Gerard Randall
 Title: Board Chair

Agency: Community Relations- Social Development Commission

Program	Corrective Action Requested	Issuing Agency	Dates and Method of Communication	Corrective Action Taken	Resolved?
Civic Justice Program	SDC Timesheets for Civic Justice Program do not allow for the proper recording of employees time to each program, the employee works on timesheets and is modified to allow employees to allocate their time more accurately to each program they work in.	Milwaukee Area Workforce Investment Board	This corrective action draws from an on-site visit to SDC's WIFIP program and offices (1041 Richards Street) on June 20 th 2013	Timesheets were modified per MAWIB's recommendations within 30 days of the request for compliance	Yes.
Senior Companion Program	Senior Companion Program Grant-Background check policies must be in place as well as documentation on file for all Senior Companion employees hired after November 23, 2007 which includes: 1) Prior written authorization from the individual for the State criminal registry check and the appropriate sharing of the results of the check within the program; 2) Documented the individual's understanding that selection into the program is contingent upon the organization's review of the individual's criminal history, if	Corporation for National Community Service, Wisconsin State Office	This corrective action was communicated by email on May 17, 2013 from the CNCS.	State criminal background checks and National Sex Offenders checks have been run on all Companions and staff who entered the program after November 23, 2007. These checks plus FBI finger print checks have been conducted on all Companions and staff who entered the program after April, 2011, in compliance with the new background checks rules made effective on April 23, 2011. In addition, documentation is on file	Yes.

<p>any; and 3) Provided a reasonable opportunity for the individual to review and challenge the factual accuracy of a result before action is taken to exclude the individual from the position.</p>	<p>for these checks.</p> <p>A section on Background Checks has been added to page 19 of the Program's policy manual. It lists the checks that are included.</p> <p>In addition the SDC Senior Companion Program Application form has been modified to include specific information on the background checks and the right to appeal an adverse result.</p>	<p>The words "sex and sexual orientation" were added to the non-discrimination clause of the Memo of Understanding (Paragraph 15, Page 3)</p>	<p>Yes</p>	<p>Yes.</p>
<p>Senior Companion Programs</p>	<p>The Senior Companion Program MLO must contain the required non-discrimination commitment toward sex and sexual orientation</p>	<p>Corporation for National Community Services Wisconsin State Office</p>	<p>This corrective action was communicated by email on May 17, 2013 from the CICS.</p>	<p>In addition to the changes noted above, the Background Check section of the SCP Policy Manual includes a</p>
<p>Senior Companion Program</p>	<p>The Senior Companion program must maintain background check documentation for all Senior Companions whose service began after November</p>	<p>Corporation for National Community Service, Wisconsin State</p>	<p>This corrective action was communicated by email on May 17, 2013 from the CICS.</p>	<p>Background Check section of the SCP Policy Manual includes a</p>

<p>Senior Companion Program, Continued</p>	<p>23, 2007. Background check policies must be in place as well as documentation on file for all Senior Companion employees whose service began after November 23, 2007 which includes:</p> <ol style="list-style-type: none"> 1) Prior written authorization from the individual for the State criminal registry check and the appropriate sharing of the results of the check within the program; 2) Documented the individual's understanding that selection into the program is contingent upon the organization's review of the individual's criminal history, if any; and 3) Provided a reasonable opportunity for the individual to review and challenge the factual accuracy of a result before action is taken to exclude the individual from the position. 4) Ensure that an individual for whom the results of a required criminal registry check are pending, is not permitted to have access to 	<p>Office</p>		<p>prohibition on any Companion seeing clients before their Background check is complete. All Volunteer Stations have been notified of this requirement, and it is emphasized in our training classes as well.</p>	
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	<p>children, persons age 60 or older, or individuals with disabilities without being accompanied by an authorized program representative who has been previously cleared for such access.</p>	<p>Senior Companion The IDC Senior Companion program lacks a number of written policies and procedures that should be included in the Senior Operations Manual and Senior Companion Handbook. Program sources must include the following policies: 1) Volunteers and trained staff do not engage in and grantee funds are for need, for any of the following activities to the extent they are prohibited in the applicable program: regulatory (electoral activities, voter registration, voter transportation to polls, and efforts to influence legislation) 2) Volunteer station fundraiser support by the Senior Corps projects not a precondition for that station to obtain volunteer services. 3) Grant funds can't be</p>	<p>Coordinational National Community Services Wisconsin State Office</p>	<p>This corrective action was communicated by email on May 17, 2013 from the CMCs.</p>	<p>The policies listed in points 1, 2, and 4 have now been specifically included in our SCP Policy Manual in two places: Page 16 (for Companions) and Page 19 (for staff). The Manual's section on Volunteer Stations now includes a prohibition on considering financial support in the selection of a volunteer station (Paragraph C, page 9).</p>	<p>Yes</p>
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<p>used to finance labor or other labor organizations or related activities. 3) Project staff or volunteers do not give religious instruction, conduct worship services, or engage in proselytization as part of their duties.</p>	<p>Milwaukee County</p>	<p>Notification and request for corrective action was communicated via email in December 2012</p>	<p>DHHS provided guidelines for documenting CE eligibility in WHEAP system notes, and staff was trained.</p>	<p>Yes.</p>
<p>A Wisconsin Home Energy Assistance Program (WHEAP) application audit found that 7% of applications contained incomplete WHEAP notes</p>	<p>Milwaukee County</p>	<p>Notification and request for corrective action was communicated via email in December 2012</p>	<p>WHEAP notes were corrected, completed and contained all required documentation</p>	<p>Yes.</p>
<p>3% of applications were missing or contained incorrect methods to determine CE</p>	<p>Milwaukee County</p>	<p>Notification and request for corrective action was communicated via email in December 2012</p>	<p>Application was reviewed and re-processed, no Zero Income form was needed.</p>	<p>Yes.</p>
<p>One application was missing Zero Income Forms, as required</p>	<p>Milwaukee County</p>	<p>Notification and request for corrective action was communicated via email in December 2012.</p>	<p>Application was reviewed and re-processed, no Zero Income form was needed.</p>	<p>Yes.</p>

Energy Assistance	One application with households that are Zero Income was missing annotated Certification Page	Milwaukee County	Notification and request for corrective action was communicated via email in December 2013	Application was reviewed and re-processed, no Zero Income form was needed	Yes
Energy Assistance	Crisis funding incorrectly issued per the 2013-2014 Crisis Plan. Several cases had funding taken from LIHEAP vs. both LIHEAP and Public Benefits.	Milwaukee County	Administrative Review August 2014	Staff is trained on taking funds from both funding sources as indicated in the current Crisis Plan. Exceptions to be noted in the WHEAP note sections and are approved by Supervisor	Yes
Energy Assistance	Entire Interactive Interviews are correctly noted in WHEAP notes	Milwaukee County	Administrative Review August 2014	Training on Aug 18, 2014 with staff to correctly select when to use Interactive Interviews. Examples provided on how phone application can be interactive.	Yes
Energy Assistance	Correctly checking the outreach indicator on the WHEAP application form.	Milwaukee County	Administrative Review August 2014	Train has been trained in selecting the appropriate indicator and the importance of selecting it correctly.	Yes
Energy Assistance	Human Resources: A worker entered signatures and date	Milwaukee County	Administrative	Recommended Corrective Action is that	Yes

<p>Energy Assistance</p>	<p>indefectly on the employee BID background check form.</p>	<p>County</p>	<p>Review August 2014</p>	<p>all forms be reviewed for accuracy by the supervisor or responsible department (HRD staff) upon submission by the employee or potential employee. In the case of errors, corrections are made to the document by the employee and initiated by the employee and the reviewer.</p>
<p>Energy Assistance</p>	<p>One page of a three page was initially located by the HR staff located later in the review. Milwaukee County noted the finding as non-compliance for incomplete due not all information not being together.</p>	<p>Milwaukee County</p>	<p>Administrative Review August 2014</p>	<p>Milwaukee County recommends that all employee records be reviewed annually for completeness and compliance.</p>
<p>Energy Assistance</p>	<p>Case Specific connections:</p> <ul style="list-style-type: none"> • WHEAP application • required reprocessing • Employee record for Caregiver Background Checks 	<p>Milwaukee County</p>	<p>Program Review November 2014</p>	<p>Milwaukee County requested reprocessing of application SDC HR to review employee records</p>
<p>Energy Assistance</p>	<p>Policy specific findings</p>	<p>Milwaukee</p>	<p>Request for policy updates during</p>	<p>Milwaukee County requested that written</p>

	<ul style="list-style-type: none">• CBC policy to be modified• Procedures and monitoring for non-citizens	County	Program Review November 2014	policies be updated and reviewed	
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**RESOLUTION REGARDING FILE 99-233 REQUIRING BACKGROUND CHECKS
FOR AGENCIES SERVING YOUTH**

Proposer certifies that it will comply with the provisions of the Milwaukee County Resolution Requiring Background Checks, File No. 99-233. Agencies under contract shall conduct background checks at their own expense.

RESOLUTION REQUIRING BACKGROUND CHECKS ON DEPARTMENT OF HEALTH AND HUMAN SERVICES CONTRACT AGENCY EMPLOYEES PROVIDING DIRECT CARE AND SERVICES TO CHILDREN AND YOUTH

Provisions of the Resolution requiring criminal background checks for current or prospective employees of DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements providing direct care and services to Milwaukee County children and youth were initially passed by the County Board in September, 1999.

In May, 2000, the County Board adopted a modification of the resolution that separates individuals who have committed crimes under the Uniform Controlled Substances Act under Chapter 961 Wisconsin Statutes from the felony crimes referenced in the original Resolution and those referenced under Chapter 948 of the Statutes.

The Resolution shall apply only to those employees who provide direct care and services to Milwaukee County children and youth in the ordinary course of their employment, and is not intended to apply to other agency employees such as clerical, maintenance or custodial staff whose duties do not include direct care and services to children and youth.

1. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall certify, by written statement to the DHHS, that they have a written screening process in place to ensure background checks, extending at least three (3) years back, for criminal and gang activity, for current and prospective employees providing direct care and services to children and youth. The background checks shall be made prior to hiring a prospective employee on all candidates for employment regardless of the person's place of residence.
2. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall certify, by written statement to the DHHS, that they are in compliance with the provisions of the Resolution; that the statement shall be subject to random verification by the DHHS or its designee; and, that the DHHS or its designee shall be submitted, on request, at all reasonable times, copies of any or all background checks performed on its employees pursuant to this Resolution.
3. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements which do not submit to the DHHS or its designee, copies of any or all background checks, on request, at all reasonable times, pursuant to this Resolution, shall be issued a letter of intent within 10 working days by the DHHS or its designee to file an official 30-day notice of termination of the contract, if appropriate action is not taken by the contract agency towards the production of said documents.
4. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall perform criminal background checks on current employees who provide direct care and services to children and youth by January 31, 2001 and, after 48 months of employment have elapsed, criminal background checks shall be performed every four (4) years within the year thereafter.

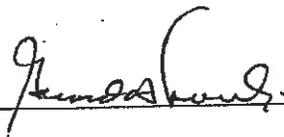
5. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall hire prospective employees after January 31, 2001 conditioned on the provisions stated above for criminal background checks and, after four (4) years within the year thereafter, and for new employees hired after January 31, 2001.
6. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements which determine that a current or prospective employee was convicted of one or more of the following offenses shall notify the DHHS or its designee immediately. Offenses include: homicide (all degrees); felony murder; mayhem; aggravated and substantial battery; 1st and 2nd degree sexual assault; armed robbery; administering dangerous or stupefying drugs; and, all crimes against children as identified in Chapter 948 of Wisconsin Statutes.
7. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements which determine that a current or prospective employee was convicted of any other offense not listed in Number 6 shall notify the DHHS or its designee immediately. Offenses include but are not limited to: criminal gang member solicitations; simple possession; endangering public safety; robbery; theft; or, two (2) or more misdemeanors involving separate incidences within the last three (3) years.
8. DHHS contract agency employees and employees of agencies/organizations with which the DHHS has reimbursable agreements who provide direct care and services to children and youth, charged with any of the offenses referenced in Number 6 and Number 7, shall notify the DHHS or its designee within two (2) business days of the actual arrest.
9. Upon notification from a contract agency or from agencies with other reimbursable agreements that their screening process has identified a current or prospective employee with a conviction as stated in Number 6, or a conviction that occurred less than three (3) years from the date of employment as stated in Number 7, the DHHS or its designee shall issue a letter of intent within 10 working days to file an official 30-day notice of termination of the contract if appropriate action is not taken towards the exclusion of said individual from having any contact with children or youth in the direct provision of care and services to children and youth.
10. The DHHS or its designee, upon receipt of notification of potentially disqualifying past criminal misconduct or pending criminal charges as stated in Number 6 and Number 7 of this Resolution, shall terminate the contract or other agreement if, after 10 days' notice to the contract agency, the DHHS or its designee has not received written assurance from the agency that the agency has taken appropriate action towards the convicted current or prospective employee consistent with the policy expressed in this Resolution.
11. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements which determine that a current or prospective employee was convicted of any crime under the Uniform Controlled Substances Act under Chapter 961 of Wisconsin Statutes, excluding simple possession, and the conviction occurred within the last five (5) years from the date of employment or time of proposal, shall notify the DHHS or its designee immediately.
12. Upon notification from a contract agency or from agencies with other reimbursable agreements that their screening process has identified a current or prospective employee with a conviction under the Uniform Controlled Substances Act under Chapter 961 of Wisconsin Statutes, excluding simple possession, the DHHS or its designee shall issue a letter of intent, within 10 working days, to file an official 30-day notice of termination of the contract if appropriate action is not taken towards the exclusion of said individual from having any contact with children or youth in the direct provision of care and services to children and youth. **Current or prospective employees of DHHS contract agencies or other reimbursable agreements who have not had a conviction within the last five (5) years under the Uniform Controlled Substances Act under Chapter 961 of Wisconsin Statutes, excluding simple possession, shall not be subject to the provisions of this Resolution.**

CERTIFICATION STATEMENT

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

This is to certify that Community Relations- Social Development Commission (SDC)
(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:  Date: April 1, 2015

Printed Name: Gerard Randall
Title: Board Chair

Agency: Community Relations - Social Development Commission

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.

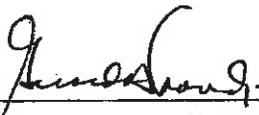
DEFINITION: EMPLOYEES AS CAREGIVERS (Wisconsin Caregiver Program Manual, <http://dhfs.wisconsin.gov/caregiver/pdffiles/Chap2-CaregiverBC.pdf>)

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 Relations- Social Development Commission 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: April 1, 2015

Printed Name: Gerard Randall

Title: Board Chair -

Agency: Community Relations- Social Development Commission

Energy Assistance Proposal

Gallegos, Diane

Tue 3/31/2015 1:18 PM

To: George Hinton (ghinton@cr-sdc.org) <ghinton@cr-sdc.org>;

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.**

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
414-289-5744

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

4/1/2015

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

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The Resolution shall apply only to those employees who provide direct care and services to Milwaukee County children and youth in the ordinary course of their employment, and is not intended to apply to other agency employees such as clerical, maintenance or custodial staff whose duties do not include direct care and services to children and youth.

DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall certify, by written statement to the DHHS, that they have a written screening process in place to ensure background checks, extending at least three (3) years back, for criminal and gang activity, for current and prospective employees providing direct care and services to children and youth. The background checks shall be made prior to hiring a prospective employee on all candidates for employment regardless of the person's place of residence.

2. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements shall certify, by written statement to the DHHS, that they are in compliance with the provisions of the Resolution; that the statement shall be subject to random verification by the DHHS or its designee; and, that the DHHS or its designee shall be submitted, on request, at all reasonable times, copies of any or all background checks performed on its employees pursuant to this Resolution.
3. DHHS contract agencies and agencies/organizations with which the DHHS has reimbursable agreements which do not submit to the DHHS or its designee, copies of any or all background checks, on request, at all reasonable times, pursuant to this Resolution, shall be issued a letter of intent within 10 working days by the DHHS or its designee to file an official 30-day notice of termination of the contract, if appropriate action is not taken by the contract agency towards the production of said documents.
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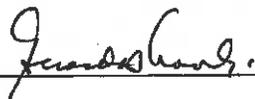
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CERTIFICATION STATEMENT

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(Name of Agency/Organization)

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- (3) is in compliance with the provisions of File No. 99-233, the Resolution requiring background checks.

Authorized Signature:  Date: March 25, 2014

Printed Name: Gerard Randall
Title: Board Chair

Agency: Community Relations - Social Development Commission

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.

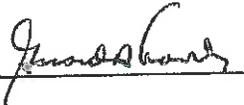
DEFINITION: EMPLOYEES AS CAREGIVERS (Wisconsin Caregiver Program Manual, <http://dhfs.wisconsin.gov/caregiver/pdf/files/Chap2-CaregiverBC.pdf>)

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 Relations- Social Development Commission 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 25, 2014

Printed Name: Gerard Randall

Title: Board Chair -

Agency: Community Relations- Social Development Commission

CULTURAL COMPETENCE

Cultural Competence - A set of congruent behaviors, attitudes, practices and policies formed within a system, within an agency, and among professionals to enable the system, agency and professionals to work respectfully, effectively and responsibly in diverse situations. Essential elements of cultural competence include valuing diversity, understanding the dynamics of difference, institutionalizing cultural knowledge, and adapting to and encouraging organizational diversity.

Cultural Humility - Cultural Humility recognizes variation within members of a group which may otherwise be similar in terms of race, gender, ethnicity, or other characteristic. The emphasis in Cultural Humility is not on specific knowledge of any given cultural orientation, but rather on an approach which demonstrates a respectful attitude toward diverse points of view, recognizing that groups of individuals cannot be reduced to a set of discrete traits. This approach specifically avoids making broad assumptions about groups based on defined traits or behaviors; instead, it focuses on recognizing and integrating the unique perspective each client brings to the service delivery experience.

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.

The Social Development Commission (SDC) provides services to a diverse population of residents who live in Milwaukee County. As such, the agency maintains a diverse group of staff, board, and volunteer members who make contributions to the development of a culturally competent team.

The SDC approach to staff development focuses on customer service directed to SDC clients who participate in a number of SDC programs and services. SDC works to prepare its staff to address clients in a cultural appropriate and sensitive manner, to learn effective cross-cultural communication and conflict resolution techniques. In early fall an all-staff training event includes interactive workshops that focus on customer service and provides staff with tools to help them determine cultural perceptions that may make communication a challenge. SDC feels that when staff is able to understand these cultural perceptions, they are better able to meet clients' needs and gain a personal level of trust.

SDC develops and maintains cultural competence through the following policies, procedures, and practices:

- New employees and managers are informed of the SDC's Equal Rights Policy Statement as part of their orientation program and in-service training. New staff will receive training on the policy, along with instruction on the laws and regulations concerning equal opportunity in employment and service delivery.
- Staff refresher training for Equal Rights Policy updates are required once every three years.
- The Equal Rights Policy is available in alternate formats.
- A short form of the Equal Rights Policy is included in recruitment materials, use of media, publications, phone listings, and directories.
- The Equal Rights Policy is incorporated in contracts and agreements with vendors and contractors for services.
- Customer referral sources are notified of the Equal Rights Policy.
- The SDC's Equal Opportunity Coordinator has received civil rights training.
- The SDC's Equal Opportunity Coordinator provides cultural awareness, disability sensitivity and language needs for provider staff training.
- The SDC's Equal Opportunity Coordinator provides input to management to improve equal opportunity in employment and service delivery.
- The SDC assures that services are equally available to everyone by:
 - Providing equal access to all programs, services or activities, including but not limited to eligibility, treatment, staff assignments, outreach, intake, diagnosis, assessment, evaluation, research, days and hours of service, facilities assignments, communication of information, and referrals to other services.
 - Providing language interpreters to assist applicants and customers with limited ability to read, speak, or understand program rules and guidelines.
 - Providing literature, posting information and audio-visual materials in languages understood by customers.
 - Providing culturally competent bilingual and/or bicultural qualified staff and specialized services so as to maximize use and completion of the program.
 - Ensuring that sanctions and terminations are applied in a culturally sensitive and non-discriminatory manner.
- All SDC staff are encouraged to participate in agency-sponsored diversity training.
- All SDC case managers participating in case management training are educated in culturally competent service delivery practices.

The agency continues to maintain staff that approximates the cultural diversity of our clients. This is achieved through advertising in diverse job search websites, and posting openings at many sites throughout the county. This cultural diversity is shown by the table below:

SDC Agency Wide Diversity		
Race/Ethnicity	SDC Staff	SDC Clients
African American	72 (51%)	55,213 (64%)
Caucasian/White	33 (24%)	16,391 (19%)
Asian/Pacific Islander	4 (3%)	-

American Indian	2 (1%)	-
Two or more races	4 (3%)	-
Hispanic/Latino	26 (18%)	17,254 (20%)

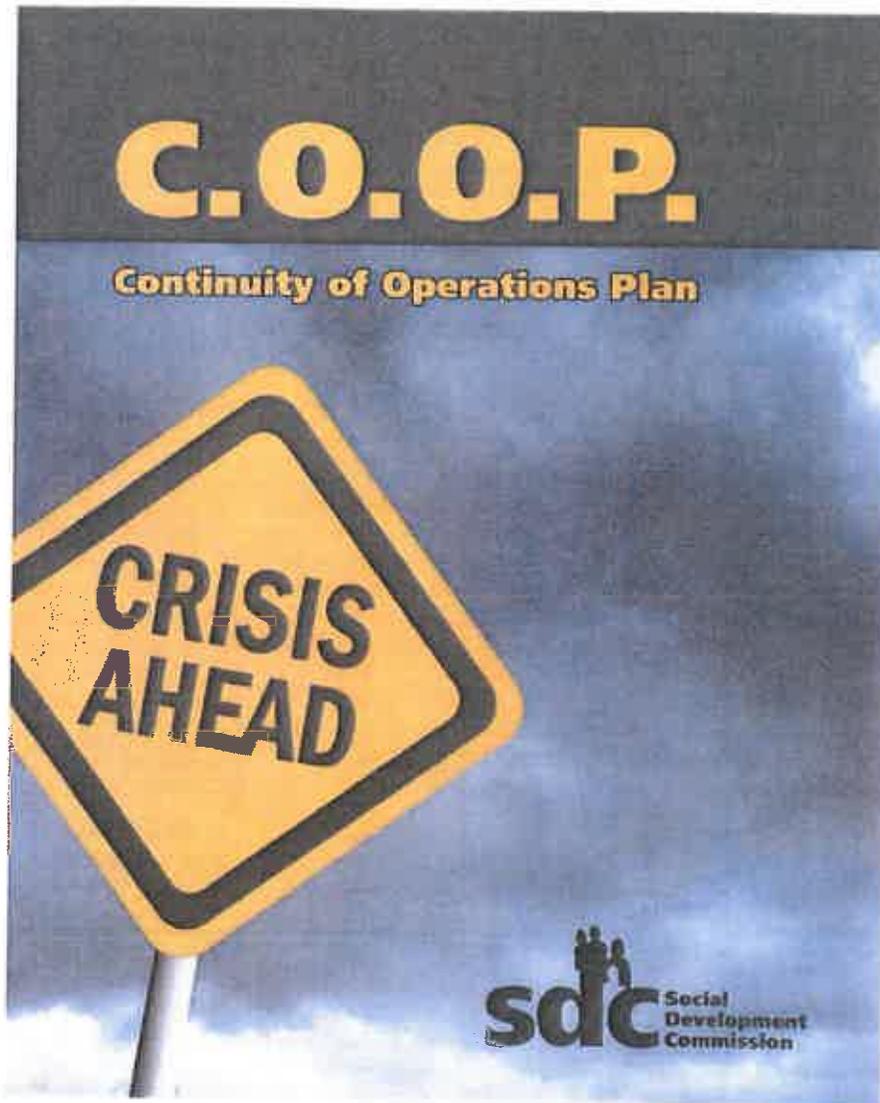
In addition to cultural competency, cultural humility is promoted throughout the agency as well. A respectful attitude toward differing points of view is promoted and encouraged throughout the agency, especially in service delivery. Youth & Family Development Program staff provides holistic case management service on a case by case basis, both on a family and individual level. This case management service delivery is provided in a manner that is culturally humble through:

- Being open and taking the time to learn about the clients' needs and cultural background.
- Exhibiting culturally sensitive case management and programming.
- Being sensitive to clients' pasts, and looking toward their future, both in the transition from poverty to self-sufficiency, and in the encouragement of clients as they define their individual sense of self.
- Actively promoting the fact that poverty does not define an individual or his or her sense of self.

EMERGENCY MANAGEMENT PLAN

ITEM # 24

The Social Development Commission is committed to the safety of its customers, clients and stakeholders. SDC recognizes the importance of a comprehensive Business Continuity Plan to insure safety, health and continued availability of quality services to our clients. To insure the effective availability of essential services, SDC operates on a Continuity of Operation Planning (COOP) with focus on Disaster Prevention and Total Business Recovery. This plan is designed and enables critical business activities to continue without interruption when unexpected event(s) occur. The plan entails critical business processes, activities and related risks to proactively minimize potential losses and ensure the continuity of operations in the event of unexpected events. Revised in January of 2014, the COOP is attached here:



SOC 2/14/2014

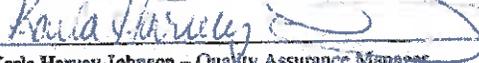
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Document Approval

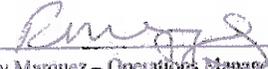
This document has been reviewed and approved for use by:



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Community Relations – Social Development Commission
Continuity of Operation Plan – (COOP)

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Section 1

1.1 POLICY STATEMENT

It is the policy of the Community Relations-Social Development Commission (SDC) to maintain a comprehensive Continuity of Operations Plan (COOP) for all critical agency-wide functions. Directors and or managers of each department are responsible for ensuring compliance with this policy. SDC Disaster Recovery efforts exercise reasonable measures to protect employees, safeguard assets and clients' accounts.

This Continuity of Operations Plan is an agency-wide blueprint for the Community Relations-Social Development Commission located in Milwaukee Wisconsin. The plan is designed to guide SDC through a recovery effort of specifically identified agency functions. At the onset of an emergency condition, SDC employees will respond quickly to any condition, which could impact the agency's ability to provide services. The procedures included in this plan are designed to provide clear, concise and essential directions to recover from various degrees of interruptions and/or disasters to the agency.

1.2 CONFIDENTIALITY STATEMENT

This manual remains the property of Community Relations – Social Development Commission (SDC) and may be repossessed at any time. Unauthorized use or duplication of this manual is strictly prohibited and may result in disciplinary or legal action.

1.3 MANUAL DISTRIBUTION

Copies or replacement of this plan will be posted on the SDC intranet/insider for staff to access. Program Directors/ Managers will receive one printed version to be posted in a designated area of the facility. The revision date of the manual is located in the lower left hand corner of the footer. This date indicates the most published date of the plan.

1.4 Executive Overview

The Social Development Commission is committed to its customers, clients and stakeholders. SDC recognizes the importance of a comprehensive Business Continuity Plan to insure safety, health and continued availability of quality services to our clients. To insure the effective availability of essential services, SDC has implemented a Continuity of Operation Planning (COOP) with focus on Disaster Prevention and Total Business Recovery. This plan is designed and enables critical business activities to continue without interruption when unexpected event(s) occur. The plan entails critical business processes, activities and related risks to proactively minimize potential losses and ensure the continuity of operations in the event of unexpected events.

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1.5 Purpose

SDC's Continuity of Operation Planning (COOP) purpose is to ensure quick and effective recovery of SDC's location at the time of a business interruption or disaster regardless of the type of event (i.e. accidental, man-made, or natural disaster).

The goal of the COOP is to:

1. Minimize interruptions to the normal operations
2. Limit the extent of disruption and damage
3. Minimize the economic impact of the interruption
4. Identify alternative location(s)
5. Train key personnel with emergency procedures
6. Provide rapid restoration of service

1.6 Applicability

This policy applies to all SDC programs and locations.

1.7 Scope

The COOP Plan is to be executed only after immediate life-safety issues are addressed. Although a plan can be written to address every possible type of disaster, this plan is intended to be used as a procedural resource during a disaster.

1.8 Policy

The Contingency of Operation Plan policy is as follows:

- ▣ SDC shall develop a COOP plan to meet the needs of critical supporting operations in the event of a disruption extending beyond normal business hours
- ▣ Procedures for executing the plan shall be documented and reviewed at least annually and updated as necessary
- ▣ Appropriate personnel shall be trained to execute contingency procedures
- ▣ The plan, recovery capabilities and personnel must be tested to identify weaknesses of the capability at least annually
- ▣ The plan facilitates the identification of resources required to resume business operations at a survival able level which includes:
 - Critical internal resources
 - Critical vendor and suppliers
 - Infrastructure and dependencies

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Section II

2.1 Line(s) of Succession and delegation of authority

Emergency Leadership Transition Policy Statement

The Community Relations - Social Development Commission recognizes the need to ensure the continued operation of the organization in the event of the unforeseen disability, death, or departure of the Chief Executive Officer. In the unlikely event of an untimely vacancy, the Community Relations - Social Development Commission has in place the following emergency succession plan to facilitate the transition to both interim and long-term leadership.

The Board of Commissioners has participated in the development of the attached emergency succession plan. The process has included a careful review of the position description of the Chief Executive Officer and assignment of key responsibilities in the areas of organizational leadership, program development, program administration, operations, financial operations, resource development, community presence and Board of Commissioners' relationships.

Promulgation:

Whereas the Community Relations - Social Development Commission has a rich tradition of leadership dating back to its founding in 1963;

Whereas this leadership has enabled the Community Relations - Social Development Commission to grow and advance its mission and operations to a position of prominence in the area of poverty eradication, and;

Whereas in order to continue this tradition of excellence in leadership, it is essential that the Community Relations - Social Development Commission further develop staff leadership for the future and establish procedures for the continuity and transition of leadership;

Therefore, be it resolved that the Board of Commissioners adopt and review and update annually, an Emergency Leadership Succession Plan to facilitate the continuity and orderly transition of staff leadership in the event of an unforeseen departure of the Chief Executive Officer.

Approved by action of the Board of Commissioners on December 16, 2010.

Signed this day by: *(Reference COOP version 12 for actual captured signatures)*

Robbie Webber
Board Chairperson

July 31, 2012
Date

Deborah Blanks
Chief Executive Officer

August 3, 2012
Date

Acting Chief Executive Officer Appointee

Date

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2.2 Chief Executive Officer Emergency Succession Plan

1. **Rationale:** In order to ensure the continuous coverage of the Chief Executive Officer duties critical to the ongoing operations of the Community Relations – Social Development Commission and its services to customers and constituents, the Board of Commissioners is adopting policies and procedures for the temporary appointment of an Acting Chief Executive Officer in the event of an unplanned or extended absence of the Chief Executive Officer.

While the Board acknowledges that such an absence is unlikely and undesirable, due diligence in exercising its governance functions requires that the Board have an emergency succession plan in place. It is expected that this plan will ensure continuity in external relationships, organization operations and staff functioning.

As necessary, the Core Executive Leadership Team members will complete supervisory and management training in preparation for such an absence.

The Chief Executive Officer will ensure completion of requisite training and preparatory activity to educate and inform the Core Executive Leadership Team members of their responsibilities in the event of an unplanned absence. Cross-training of other staff will be provided. The training will include notification of emergency succession plans, roles and responsibilities.

The Chief Executive Officer will ensure that an operations inventory is completed and updated as necessary. The inventory will include corporate and nonprofit status documents, financial information and contacts, benefits information and contacts and office lease information and contact.

2. **Temporary, Unplanned Absence (Short-term):** A temporary absence is defined as an absence of less than three months and one in which the Chief Executive Officer will return to his/her position once the events precipitating the absence are resolved. An unplanned absence is one that arises unexpectedly, in contrast to a planned leave, such as vacation or sabbatical.
 - A. In the event of an unplanned short-term absence, the Board of Commissioners empowers the Board Chairperson to implement the terms of the emergency succession plan to ensure short-term continuation of the Community Relations – Social Development Commission operation and uninterrupted leadership.
 - B. In the event of an unplanned short-term absence of the Chief Executive Officer, the highest ranking Core Executive Leadership member is instructed to immediately notify the Board Chairperson or, in his/her absence, the Board Vice-Chairperson, of the absence. As soon as feasible, the Chairperson is instructed to convene an emergency meeting of the Board of Commissioners to affirm the procedures in this plan or to make modifications as the Board of Commissioners deems appropriate.
 - C. The Board at the emergency meeting will determine who, if anyone will hold the position of Acting Chief Executive Officer.
 - D. Should the standing appointee to the position of Acting Chief Executive Officer be unable to serve in that capacity, a back-up appointee for the position of Acting Chief Executive Officer shall be named.
 - E. If the Acting Chief Executive Officer is new to his or her position (less than one year), the Board of Commissioners may appoint the back-up appointee to the position. The Board may also consider the option of splitting executive duties among multiple designated appointees.

- F. Authority of the Acting Chief Executive Officer: The Acting Chief Executive Officer shall have the same authority for decision-making and independent action as the absent Chief Executive Officer with the following stipulations: The Board Chairperson shall have authority to:
- a. manage the operating results of the Community
 - b. provide oversight of all program and service delivery
 - c. establish and maintain effective communications
 - d. overall personnel decision-making
 - e. approve all organizational expenditures
 - f. provide contract compliance oversight
- G. Compensation of Acting Chief Executive Officer: To compensate for the additional responsibilities required of the Acting Chief Executive Officer, he/she shall be offered additional compensation for the term of the short-term unplanned absence. Compensation will be in the form of a temporary increase in salary of a minimum of 10% over their current annual salary.
- H. Board Oversight of the Acting Chief Executive Officer: The Acting Chief Executive Officer shall report to the Board Chairperson about Board Policies regarding Executive Limitations during the short-term absence of the Chief Executive Officer. It is anticipated that reporting will occur frequently, minimally weekly, to ensure the Chairperson is fully informed about matters important to the organization's stability.
- I. Completion of Short-Term Emergency Succession Plan: The decision about when the absent Chief Executive Officer returns to lead the Community Relations – Social Development Commission will be determined by the Board Chairperson and the Chief Executive Officer who will mutually decide upon return to work dates. A reduced work schedule for a set period of time may be permitted with the approval of the Board of Commissioners.
3. Long-term Unplanned Absence: A long-term unplanned absence is defined as an absence of more than three months and one in which the Chief Executive Officer will return to his/her position once the events precipitating his/her absence are resolved. A long-term unplanned absence is one that arises unexpectedly. The procedures and conditions to be followed should be the same as for the short-term absence with one addition:
- A. The Board of Commissioners will give immediate consideration, in consultation with the Acting Chief Executive Officer, to temporarily filling the areas of need on staff that may have arisen as a result of the Chief Executive Officer's absence or the new responsibilities of the Acting Chief Executive Officer. This recognizes the fact that for a term of more than three months, it may not be reasonable to expect the Acting Chief Executive Officer to carry the responsibilities and duties of both positions.
4. Unplanned Permanent Change in the Chief Executive Officer: A permanent change occurs when the Board of Commissioners determines that the Chief Executive Officer will not be returning to the position. In this situation the procedures and conditions will remain the same as for the long-term temporary absence with this addition:
- A. Within seven (7) days of the determination, the Board Chairperson will appoint an Ad-Hoc Committee on Transition and Search that may include Board and off-Board members within to plan and carry out a transition to a new permanent Chief Executive Officer. The Board will also consider the need for outside consulting assistance depending on the circumstances of the transition and the Board's capacity to plan and manage the transition and search. The Transition and Search Ad-Hoc Committee will also determine the need for an Interim Chief Executive Officer and plan for the recruitment and selection of an Interim Chief Executive Officer and/or permanent Chief Executive Officer.

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B. The person identified to serve as Acting Chief Executive Officer under sections 2 and 3 above shall serve until either an Interim Chief Executive Officer or permanent Chief Executive Officer is under contract to lead the agency.

5. **Communications Plan:** As soon as possible after transferring responsibilities to the Acting Chief Executive Officer, the Board Chairperson will notify the Executive Team and staff, members of the Board of Commissioners and key funders of the delegation of authority. The Acting Chief Executive Officer and Board Chairperson shall develop strategic communication points regarding the transition management. These points will be communicated to key external stakeholders and others in writing and/or verbally, as determined by the Board Chairperson.

The Board Chairperson will communicate with: all Board members, the Office of the Mayor, the Common Council President and Alderpersons, the Director of the Community Development Grants Administration, the County Executive, the County Board Chair and Supervisors, other key community partners as determined by the Chairperson and Acting Chief Executive Officer.

The Acting Chief Executive Officer will communicate with all partner and delegate organizations.

2.3 Order of Succession

SDC's order of succession is to ensure that decision-making authority is uninterrupted. Line of succession and delegation of authority has been established for key positions by the Chief Executive Officer (CEO).

The CEO may utilize the three levels of succession or may appoint one or more staff people from the Core Executive Leadership Team:

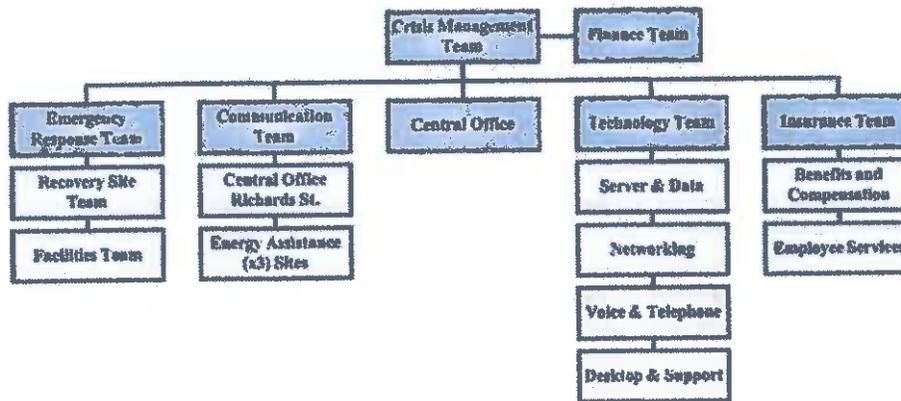
- Highest Position - Agency's highest position of authority
- Key Leadership Position - Designated multiple people with specific roles/responsibilities
- Delegation of Emergency Authorities - Designated person/ people who are authorized to make decisions or act on behalf of the department or agency head.

Section III

3.1 Team overview

The SDC COOP established the following teams. Each team plays a vital role in the in recovery operations. Members of the teams include personnel who are also responsible and accountable for assigned roles and responsibilities.

Listed below illustrates the COCP Teams.



3.2 Notification & Activation Procedures

In the event of a disaster, the plan will be activated and the Emergency Response Team (ERT) will notify the Crisis Management Team (CMT) and Communication Team (CT) and inform them of the details of the event and if relocations is required. Once teams are notified, the CT will notify their respective primary/secondary leaders of the location where the disaster occurred and inform them of all applicable information and prepare to respond and relocate if necessary. The CT will communicate messages to appropriate staff (managers, supervisors, leads, etc.) regarding procedures to follow, role/ responsibilities, alternative destinations, if applicable, and provide status updates as needed. Updates will be communicated to all team members via cell phone, internet/intranet, and through the use of emergency recorded message line. Each Administrative Department and Service Program should retain an updated phone tree at all times. This will be the avenue for line staff to receive updates.

3.3 Roles/Responsibilities

TEAM NAME	MEMBERS	ROLES/RESPONSIBILITIES
Crisis Management Team (CMT)	CEO Directors	Responsible for authorizing declarations of disaster, emergency investment strategy, approving public release of information.
Emergency Response Team (ERT)	Operations Manager Executive Support Mgr. I.T. Manager Q.A. Manager	Assess the damage caused by the disaster or ensure precautionary measures are taken in light of any impending disaster. Once the ERT determines the extent of the disaster, they have authorization to order an evacuation of the facility or work with appropriate staff to mitigate the effects to the agency or program.
Communication Team (CT)	Program Managers Executive Support Mgr.	Ensure staff, vendors and clients are notified as well as donors and constituents are informed. Also responsible for providing the right level of information to the right person about who, what, and when.
Technology Recovery Team (TRT)	I.T. Staff	Ensure that IT data and hardware are protected. Participate in the full assessment of the impact to the critical function of the organization in order to decide what action to take. The need for relocation will require the teams to evaluate the availability of "hot, warm and cold sites". When the 'hot, warm, or cold' sites have been determined, IT will be responsible for providing programs and administrative departments with a temporary network infrastructure, PC's, printers, etc., as necessary to support SDC's critical business activities.
Recovery Site Team (RST)	Executive Support Mgr. Operations Manager	Provide enterprise-level support for both the physical site and I.T. issues. RST ensures that the alternate site is adequate and prepared for relocating staff and equipment.
Finance Team (FT)	Finance Director Operations Manager	Monitor costs related to the incident; provide cost analysis and overall fiscal picture. Identify essential personnel, back-up and supporting staff for relocation or for performing essential financial functions. Ensure vital fiscal records, systems and equipment is protected from further damage.
Insurance Notification Team (INT)	Purchasing Manager.	Operations department along with programs will assess the damage. Contact the owner of the property. Operations Assistant would contact the insurance agent.
Record Retention Team (RRT)	Quality Assurance	Identify vital records to be retrieved.

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Section IV

4.1 Communication Contact Listing

SOCIAL DEVELOPMENT COMMISSION COOP TEAM CONTACT LISTING								
Team Name	Staff Name	Title	Location	P	S	Email Address	Contact Number	Alternate Contact Number
Crisis Management	George Hinton	CEO	Central Office	X		Georgehinton87@gmail.com	(262) 366-1165	
CMT	Jan Stealund	Program Service Director	Central Office	X		istenlund@cr-sdc.org	(414) 397-0392	
CMT	Kelly Parkhill	Finance Director	Central Office	X		krparkhill@gmail.com	(414) 687-0903	
CMT	Pamela Biagui	HRD Director	Central Office	X		pbiagui@att.net	(414) 218-0903	
Emergency Response	Karla Harvey-Johnson	QA Manager	Central Office	X		karlaharvey42@gmail.com	(414) 380-9115	
ERT/RST	Roy Marmuez	Operations Mgr.	All Sites	X		rm414@yahoo.com	(414) 916-4391	
ERT/INT	Monique Jones	Purchasing Manager	Central Office	X		Miones55@sbcglobal.net	(414) 530-0672	(414) 536-4440
ERT/RST	Lisa Greco	I.T. Mgr.	Central Office	X		lisa.greco@att.net	(414) 332-1939	
ERT	Abra Fortson	Executive Support Mer.	Central Office	X		Abra317@sbcglobal.net	(414) 627-2272	(414) 372-3926
Communication Team	Dale Shuster	Communications Manager	Central Office	X		dshuster@wi.rr.com	(414) 405-3233	(414) 540-1408
CT	Sandra White	Division Mgr.	Chase/Toutonia	X		sandrew.1230@yahoo.com	(414) 915-6785	
CT	Sonya Eddie	Spec. Unit Manager	Central Office		X	seddie@cr-sdc.org	(414) 241-0002	
CT	Earl Guyton	Program Manager	Food Service	X		emguyton@aol.com	(414) 510-3774	(414) 897-7844
CT	Jim Gambon	Program Manager	Weatherization			jimgambon@wi.rr.com	(414) 517-9302	

Social Development Commission COOP Team Contact List (Cont)								
Team Name	Staff Name	Title	Location	P	S	Email Address	Contact Number	Alternate Contact Number
Communication Team	Steve Schenke	Program. Mgr.	Weatherization		X	Sshutkev4@aol.com	(414) 640-9607	
Technology Recovery	Lisa Greco	IT Manager	All Sites	X		Lisa.greco@att.net	(414) 332-1939	
TRT	Suzanne Wu	System Admin	All Sites	X		Suzanna.wu@gmail.com	(414) 532-1152	
Finance Team	Kelly Parkhill	Finance Director	Central Office	X		kparkhill@cr-sdc.org	(414) 906-2744	
FT	Krystic Anderson	Grant Accountant	Central Office		X	kanderson@cr-sdc.org	(414) 906-2819	
Record Retention Team	Patricia Payne	Lead Bookkeeper	Food Service	X		ppayne@cr-sdc.org	(414) 702-9625	
Operations Team	Marcus Harris	Maintenance Lead	All Sites	X		mharris@cr-sdc.org	(414) 350-4747	
Operations Team	Leroi Adams	Security Lead	Central Office		X	ladams@cr-sdc.org	(414) 708-7208	

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Section V

5.1 Emergency Phone Numbers

In an emergency, call 911

Additional Contact Information

Contact Information	Contact Number
SDC Operations Manager	414-936-2805 Office 414-916-4391 Cell Phone
Richards Location: District Five Police Station: 2920 N. 4th Street Milwaukee, WI 53233	414-935-7252
Teutonia Location: District Four Police Station 6929 W. Silver Spring Dr. Milwaukee, WI 53218	414-935-7243
Chase Location: District Two Police Station 245 W. Lincoln Ave. Milwaukee, WI 53207	414-935-7222
Non-Emergency Police Number	414-933-4444
Fire Department - Non-Emergency	414-286-8999
WE Energies: Electrical Outages Natural Gas Leaks	800-662-4797 800-261-5325
Poison Control	800-815-8855
Road Conditions	800-762-3947
Bonded Alarm Service	414-529-1123 Alt. # 414-581-1402

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5.2 Emergency Procedures

5.2.1 Disaster Defined:

Disaster is defined as a loss of the facility processing due to a catastrophic event, which causes vital business processes to stop for an extended period of time (i.e. 24 hours or more). This includes, but not limited to:

- Any incident that may endanger the lives and safety of the employee
- Loss of the building due to fire, water damage, hurricanes, etc.
- Regional threat due to severe weather conditions, civil disruption, etc.
- Loss or delay of providing mission-critical functions for an extended period of time
- An occurrence that results in significant loss of assets or revenue flow
- An occurrence resulting in the inability to meet important customer commitments and contractual obligations or to protect the interests of SDC and/or its employees.

5.2.2 General Evacuation Procedures

General Evacuation Procedures	<p>If there is a situation that calls for evacuation, employees should contact the Operations Manager and/or nearest security personnel or 906-4615 (Richards). Facilities and/or security staff will ensure that offices and all other areas of the building are clear of employees, clients, and visitors.</p> <p>Once the notice that the building must be evacuated employees, clients and visitors will leave the building using the nearest unobstructed exit.</p> <p>All employees, clients and visitors will assemble at the SDC assembly point(s).</p> <p>If you are required to evacuate or take shelter, please take your personal items with you if possible. You may not be able to return to your office or re-enter the building.</p>
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5.2.3 Fire Evacuation Procedures

Fire Evacuation	<p>If you discover a fire or see smoke:</p> <p>Sound the building's fire alarm.</p> <p>Evacuate staff and clients through one of the EXIT lighted EXIT signs.</p> <p>Close all doors if possible, but leave them unlocked.</p> <p>Re-assemble everyone at the designated assembly point(s).</p> <p>Once everyone is safe, proceed with the following steps:</p> <p>Stay calm and call 911. Tell the dispatcher the location of the fire and be specific with details. Contact the Operations Manager.</p> <p>Account for all staff and clients visiting the premises</p> <p>Report the names of everyone not accounted for to the Fire Department, giving their last known location in the building.</p> <p>Call the Program Director/ Manager as soon as you are able to do so safely.</p> <p>The Operations Manager will contact the building's owner to report the fire.</p>
-----------------	--

5.2.4 Medical Emergencies

Medical Emergencies	Stay calm and contact nearest security personnel or 906-4615 (Richards). Provide as much detailed information as possible.
	One person should stay with the individual(s) seeking medical attention.
	Security will call 911 to report the type of injury/illness, providing them with: The condition of the individual, what happened to the individual, and their location. Security should meet the responders outside and take them directly to the location
	DO NOT MOVE INDIVIDUAL(S)
	Keep talking to the person to keep him/her at ease until paramedics arrive
	Security will complete an Incident Report and forward a copy to the Purchasing Manager and the Operations Manager.

Note: SDC staff are not allowed to administered medications to any customer, visitor or to other staff unless CPR certified.

5.2.5 Power Failure/Gas Leak Procedures

Power Failure/Gas Leak	Notify Operations Manager immediately.
	For Power Failure, the Operations Manager will call the building's owner after calling WE Energies at 1-800-662-4797 to identify the location and problem
	Security will evacuate staff and clients who are in immediate danger of the threat or of injury to the designated exterior assembly area(s).
	For gas leaks, the Operations Manager will call the building's owner after calling WE Energies at: 1-800-261-5325. Security will open doors/ windows when possible.
	If evacuation is not necessary, security will manage crowd control
	The Operations Manager will notify the CEO immediately by cell phone
	The Operations Manager will complete an incident report and forward a copy to the Purchasing Manager.

5.2.6 Tornado or Severe Weather Procedures

Tornado, snow storm or severe weather	Keep your radio or television turned on to hear broadcast from the Emergency Broadcast System (EBS). You can also tune into the Emergency Alert System (EAS) station; WTMJ 620 AM.
	Stay calm
	Stay away from the perimeter of the building and all exterior glass which can shatter during high winds; close drapes, curtains and blinds.
	If a tornado warning exists, staff and clients are to seek shelter in the designated Severe Weather Shelter Area(s). Security will direct Clients/ Visitors to area.
	Close all doors that you go through, but DO NOT LOCK THEM
	Sit down near a wall. Hold your head between your knees and lock your hands over your head
	If you are TRAPPED in a bordering area
	Stay calm
	Seek shelter under a sturdy piece of furniture
	Hold your head between your knees and lock your hands over your head
	Use good judgment
	Stay in place until weather passes and security or Emergency Officials give the all clear

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5.2.7 Lightning Strike Procedures

Lightning Strike	If a person is struck by lightning and is not breathing or has no pulse, perform CPR immediately. This is common with a lightning strike.
	Call 911 immediately and Operations Manager.
	Help the victim to be warm and dry while waiting for emergency assistance

5.2.8 Flood Procedures

In Case of Flooding	Contact the Operations Manager.
	Proceed in an orderly fashion to the highest level of the building.
	Reassemble everyone in a designated spot on the highest level of the building.
	Wait for an all clear sign from the Operations Manager or other authority before leaving the designated safety area.
	Stay clear of any electrical fixture or outlets.
	Do not enter flooded areas
The Operations Manager or security will guide staff on how to proceed once he receives clearance	

5.2.9 Threat Procedures

Threat	Call nearest security personnel immediately or 906-4615 (Richards).
	If the person against whom the threat was made is not aware of the threat, security will promptly notify him or her, provide the opportunity to talk with law enforcement, and provide safety precautions.
	Temporary suspensions (of employees) will be considered, pending an investigation. A mental health risk assessment may be required prior to return to agency.
	The victim will be provided with support services.

5.2.10 Telephone/Bomb Threat Procedures

Telephone/Bomb Threat	Start completing the Bomb/ Terrorism Checklist
	Threatening behavior must be reported to security and the Operations Manager. If the person against whom the threat was made is not aware of the threat, security will promptly notify him or her, provide the opportunity to talk with law enforcement, and provide advice on safety precautions
	Temporary suspensions (of employees) will be considered, pending an investigation. A mental health risk assessment may be required prior to return to agency. The victim will be provided with support services.
	Contact police with details of threat.

5.2.11 Theft Precautions Procedures

Theft Precautions	Do not leave purses, cell phones, money or other valuable items in view. Limit the amount of money you leave in desk drawers. If possible, secure personal items at all times.
	Do not leave cell phones, CD's, money, purses etc visible in cars

5.2.12 Theft of Personal Items Procedures

Theft of Personal Items	Stay calm and notify the Operations Manager and/or nearest security personnel or 906-4615 (Richards).
	Contact your bank, credit card and cell phone companies to cancel services.
	Complete an Incident Report and forward a copy to the Operations Manager and Purchasing Manager.
	If necessary, the Operations Manager will contact the police department so that the client, visitor or employee whose items have been stolen can complete a police report.
	The Operations Manager will review surveillance tapes and forward a copy to the police personnel.

5.2.13 Burglary Procedures

Burglary/Break In	Stay calm and notify the Operations Manager and/or nearest security personnel or 906-4615 (Richards).
	Security will call 911 and give the site location
	The Operations Manager will notify the CEO and the building's owner
	Security will wait for the police to arrive, keeping staff and clients out of the area of suspicion
	The Operations Manager will review security surveillance tapes with police
	The Operations Manager will take an inventory of missing items and complete an Incident Report. The report will be forwarded to the CEO and the Purchasing Manager
	A copy of the police report will be obtained by the Operations Manager from the 3rd District Police station located on 49th and Lisbon. Police reports are ready for pick up 5 - 10 days after the incident.

5.2.14 Physical Assault/Fight/Stalking Procedures

Physical Assault/Fight	Call 911 and stay calm and notify the Operations Manager and/or nearest security personnel or 906-4615 (Richards).
	Security will isolate the individuals and disperse onlookers, asking witnesses to remain available.
	If victim requires medical attention, follow medical emergency section, in accordance with blood-borne pathogen policy.
	Do not leave victim alone.
	When parties are separated discourage any further visual or verbal contact.
Stalking	Document all activities including potential witnesses and their contact information.
	Notify security immediately and call local law enforcement if stalker is on the premises. A safety plan will be designed in conjunction with the individual being stalked. Law enforcement, the Operations Manager, and the CEO will be notified of this plan immediately. Such plan may include a restraining order, prohibition from visiting the agency, no contact order, etc. Depending on the circumstances, staff member will be given the opportunity to change their email address, office phone number and location as necessary.

5.2.15 Suicide Attempt/Threat Procedures

Suicide Threat	Call 911 immediately
	If concerned about imminent harm, talk calmly with the individual(s) Inform the Operations Manager of the exact location of the individual making the threat.
Suicide Attempt	Call 911 immediately
	Do not leave the individual(s) members alone.
	Do not tamper with anything in area, as law enforcement may need to preserve evidence. Preserve the dignity of the individual by minimizing onlookers, and disbursing any crowds.

5.2.16 Hostage Situation Procedures

Witness a hostage situation	Call 911 immediately and the Operations Manager. If the Operations Manager is not available, contact the nearest security personnel immediately or 906-4615. Document all activities and complete an incident report
If taken hostage	Cooperate with capturer to the fullest extent possible
	Try not to panic, do not upset the capturer, always try to remain calm as possible
	Adhere to the request of the individual(s) that is holding you hostage

5.2.17 Stolen Vehicles/Plates/Stickers Procedures

Stolen Vehicles/Plates	Stay calm and notify the police and the Operations Manager or nearest security
	Complete a police report providing plate number, make/model and last known location of the vehicle
	If the vehicle is recovered, take an inventory of missing SDC property and forward that information to the Purchasing Manager who will contact the insurance company
	A copy of the police report can be obtained from the 3rd District Police station located on 49 th and Lisbon. Police reports are ready for pick up 5 - 10 days after the incident.
	Forward a copy of the police report to the Purchasing Manager once obtained
	Normally the offender only steals the plate with the sticker. If the plates are stolen the program needs to do the following:
	Stolen Plates
	Driver should notify the Operations Manager and the Program Manager with the make/model, plate number and approximate date, time and location of theft
	Program Manager will complete an Incident Report and forward a copy to the Operations Manager and Purchasing Manager who will call to complete a police report with the information provided by the program
	Stolen Sticker
	Upon completion of the police report, the Operations Manager will obtain new title, sticker, plate, and Certificate of Vehicle Registration and will forward to the Program Manager.s
	If stickers or the Certificate of Vehicle Registration are stolen, notify the Operations Manager via e-mail and the Operations Manager will have the DMV mail out replacements

5.2.18 Vehicle Accidents Procedures

Vehicle Accidents	Police Report: Driver should contact the police to complete a police report of the incident If the other driver stays on the scene, take their driver's license and vehicle information (plate number, make/model and color)
	Notification: Drivers should notify their Program Manager and the Purchasing Manager to inform them of the accident so that an incident report can be completed
	Photographs: Once the driver of the SDC vehicle arrives back on site, the Operations Manager will take pictures of the vehicle and forward copies to the Purchasing Manager
	Employee Injury: If an employee is injured in the accident, the employee's supervisor or manager must complete an accident report and forward it to the Human Resources Department. Medical attention, if necessary should be sought right away.

5.2.19 Active Armed Shooter/Weapons Procedures

Shooter outside the facility	Call 911 if possible; provide the dispatcher of the situation including location. Get all occupants on the floor and out of the line of gunfire. Also, ensure that no one is visible from outside the room. It is best to separate, rather than huddle together.
	Proceed to a room that can be locked or barricaded. Turn off all of the lights. Close and lock all windows and doors. If you cannot lock the door, barricade it with desks, chairs, etc. Close all curtains and blinds.
	Unfamiliar voices may be the shooter attempting to lure the victims from their safe space; do not respond to any voice commands until you can verify with certainty that they are being issued by a police officer.
	Remain in place until law enforcement, emergency management and/or university officials give an all clear notification.
	Remain silent. Turn off all radios or other devices that may emit sound. Silence all cell phones.
Shooter inside the facility	If you cannot safely evacuate, proceed to a room that can be locked and/or barricaded. Turn off all of the lights. Close and lock all window and doors. If you cannot lock the door, barricade it with desks, chairs, etc. Close all curtains and blinds.
	Remain silent. Turn off all devices that may emit sound. (Cell phones)
	Get all occupants on the floor and out of line of gunfire. Also, ensure that no one is visible from outside the room. It is best to separate, rather than huddle together.
	If it is possible to escape the area safely and avoid danger, do so by the nearest exit or window. Leave books, backpacks, purses, etc. in the room. As you exit the building, keep your hands above your head and listen for instructions that may be given by police officers on the outside. If you receive no instructions, proceed to a safe location.
	Contact 911 Report your name and location.
	Remain calm, keep your hands above your head and follow instructions. If an officer points a firearm at you, please try to remain calm. Make no movement that may cause the officer to mistake your actions for a threat. If you witness anything, tell the responding officers as much about what you know about the situation.

Shooter enters the building	If possible, evacuate the area immediately.
	Dial 911 if possible and alert police to the shooter's location. If you cannot speak, leave the phone open so the police can listen to what is taking place.
	Attempting to overcome the shooter with force is a very last resort that should be initiated after all other options have been exhausted.
	If the shooter leaves your area and you are able to escape, proceed immediately to a safer place. Do not touch anything that is near the shooter.

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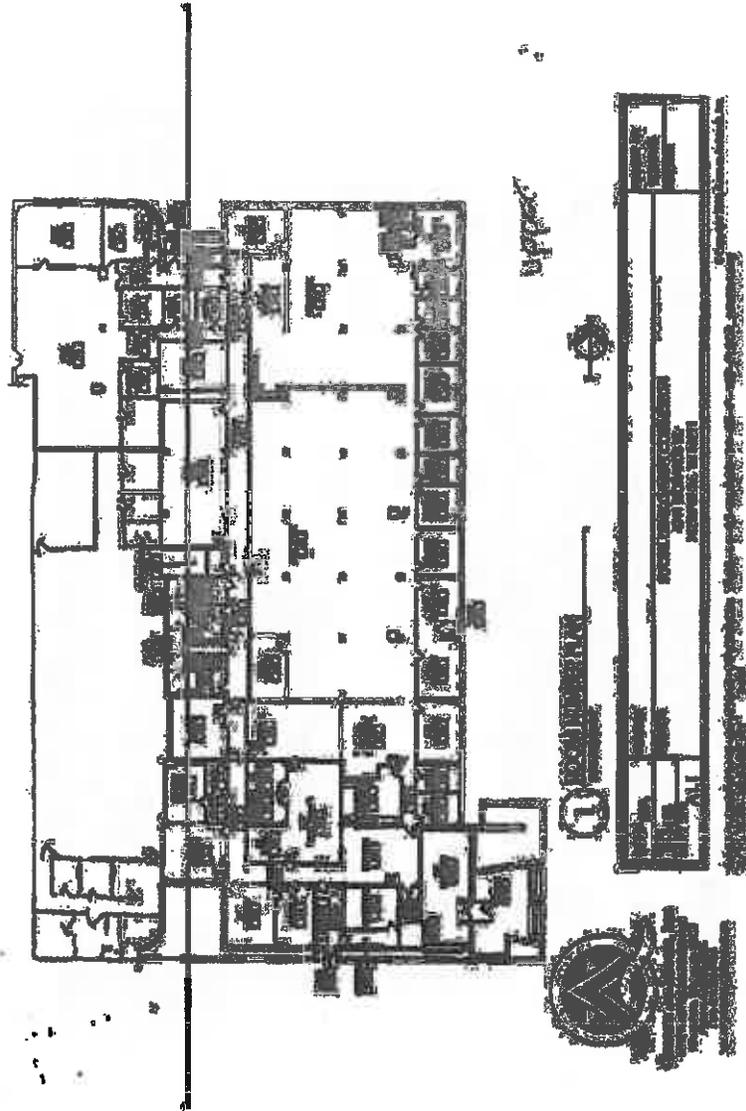
Section VI

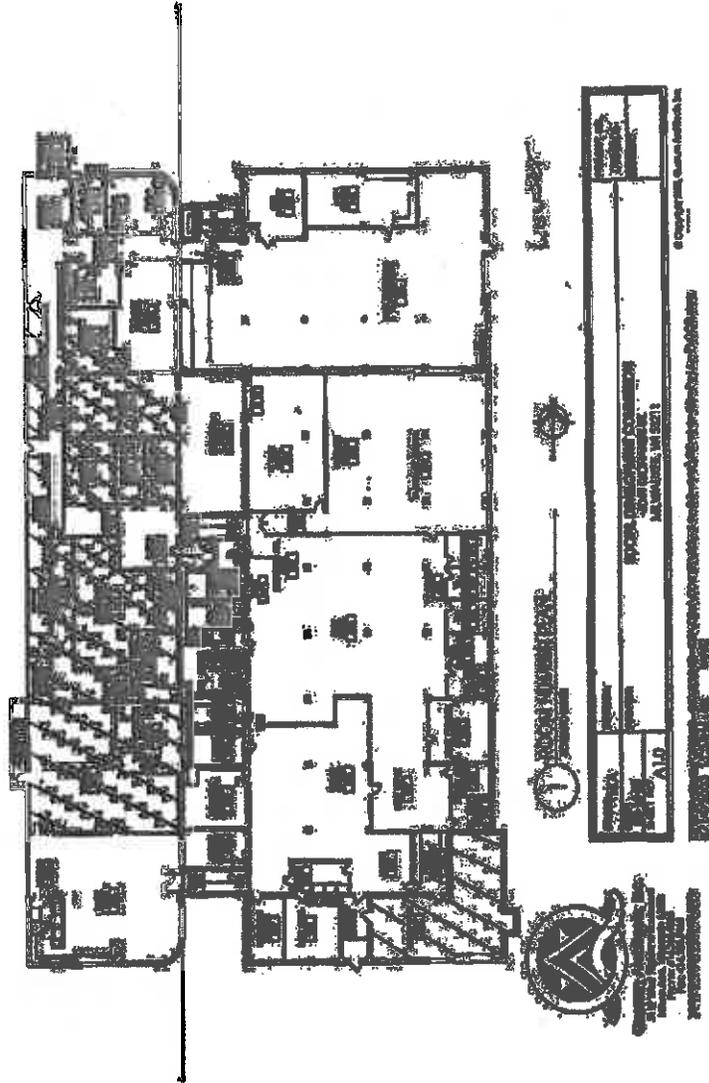
6.1 Program Assessments

Central Office Risk Assessment – 301 N Richards					
Potential Hazard	Frequency How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact What services would be disrupted if you no longer had on your program under your community's jurisdiction?	Impact Overall impact on your community?	Priority
Loss of phone system	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of computer access	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to environmental issues: Fire Flood Tornado Hurricanes Severe storms	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to services: Electrical Gas Sewage issues	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

Central Office Risk Assessment Cont.					
Potential Hazard	Probability How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact What impacts would this type of event have on your program and/or your community? What if worse?	Impact Overall impact on your program?	Priority
Loss of access/space due to deliberate disruption: Bomb threats Explosions Sabotage Organized violence	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH
Loss of access/space due to services/ systems/ security: Electric power failure HVAC Cyber-crime Breach of sensitive information I.T. systems failure	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH

SOCIAL DEVELOPMENT COMMISSION Emergency Vendor Listing 4041 N. Richards Street						
Categories	Company Name	Contact Name	Cell Number	Phone Number	Fax Number	Email Address
Insurance	GBG Insurance, Inc.	Charles Hilson		708-332-3378	708-333-3387	chilson@gbgins.com
HVAC	Mared Mechanical	Kevin Jaqua	414-322-3769	414-238-2078	414-431-0693	klacqua@maredmechanical.com
Plumbing	Mared Mechanical	Kevin Jaqua	414-322-3769	414-238-2078	414-431-0693	klacqua@maredmechanical.com
Electric	Pieper Electric	Wade Roberts		414-462-7700		
Painting	In House					
Chimney	In House					
CG Work	OPEN					
Generators	N/A					
UPS	In House					
Elevator	Access Elevator			414-727-2554		
Janitorial	Coleman Cleaning	Gus Coleman	414-499-9961			gustacoleman@yahoo.com
Security	WSSTS	Willie Brooks	414-807-2719			willie0558@att.net
Window Cleaning	In House					
Glass	Burleigh Glass		414-562-6700			
Snow Removal	Briohn Management	Dave	414-322-8017	414-322-8017		
Landscape	In House					
Garbage	Waste Management	Jade Saline		920-895-7713		
Fire Alarm	Cintas Fire Protection	Garry Bredeson		262-781-9665		
Surfholder Mini.	Cintas Fire Protection	Garry Bredeson		262-781-9665		
Mail Restacks	N/A					
Locks & Keys	Unblock	Ken Shaw		414-788-1064		
Signage	Sign A Rama	Jim		414-273-7446		
Pest Control	WIL-KU	Deanna		800-236-8735		
Fire Extinguisher	Cintas Fire Protection	Garry Bredeson	262-227-9146	262-781-9665		
Emergency Lights	Cintas Fire Protection	Garry Bredeson	262-227-9146	262-781-9665		
Parking Lot Mnt.	Eriaba Management	Dave		414-322-9017		





Energy/VTA Risk Assessment - 6348 N Teutonia					
Potential Hazard	Probability How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact What impacts would this type of event have on your program and/or your community? Would it cause:	Impact Overall impact on your program?	Priority
Loss of phone system	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of computer access	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to environmental issues: Fire Flood Tornado Hurricane Severe storms	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to services: Electrical Gas Sewage issues	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

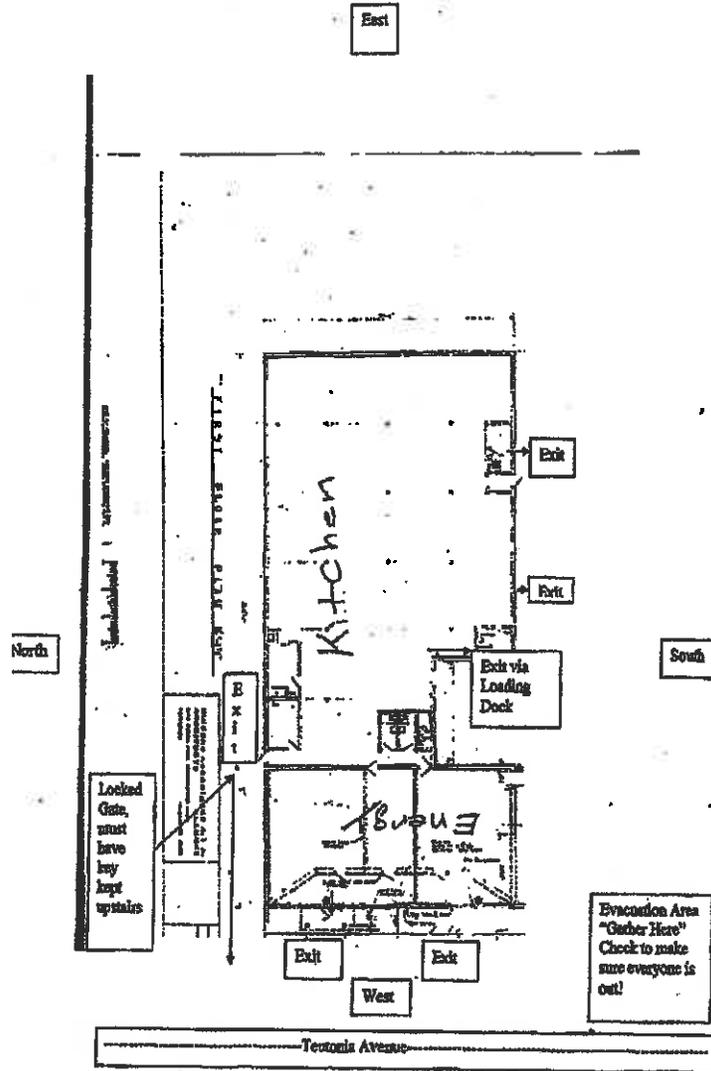
Energy/VITA Risk Assessment Chart					
Potential Hazard	Probability: How often has this event occurred in your area?	Probability: How likely is it that this event will occur in the future?	Impact: What impacts would this type of event have on your program and/or your community? Would it cause:	Impact: Overall impact on your program?	Priority
Loss of access/space due to deliberate disruption: Bomb threats Explosions Sabotage Organized violence	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to services/ systems/ security: Electric power failure HVAC Cyber-crime Breach of sensitive information I.T. systems failure	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

Food Service Risk Assessment – 6850 N Tiltonia					
Particular Hazard	Probability How often has this event occurred in your unit?	Feasibility How likely is it that this event will occur in the future?	Impact What losses would this type of event have on your program and/or your community? Would it cause:	Impact Overall impact on your program?	Priority
Loss of phone system	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH
Loss of computer access	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH
Loss of access/space due to environmental issues: Fire Flood Tornado Hurricane Severe storms	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH
Loss of access/space due to services: Electrical Gas Sewage issues	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	<input type="checkbox"/> LOW <input type="checkbox"/> MED <input type="checkbox"/> HIGH

Energy/VITA Risk Assessment Chart					
Potential Hazard	Probability How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact What impacts would this type of event have on your program and/or your community? Would it cause:	Impact Overall impact on your program?	Priority
Loss of access/pace due to deliberate disruption: Bomb threats Explosions Sabotage Organized violence	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/pace due to services/ systems/ security: Electric power failure HVAC Cyber-crime Breach of sensitive information IT systems failure	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

SOCIAL DEVELOPMENT COMMISSION Food Service/ Energy/ WTA Emergency Vendor List 644 E. 56 N. Tremont						
Categories	Company Name	Contact Name	Cell Number	Phone Number	Fax Number	Email Address
Insurance	CBG Insurance, Inc	Charles Hilson		708-333-3376	708-333-3387	chilson@cbgins.com
HVAC	Mared Mechanical	Kevin Jaqua	414-322-3769	414-536-0411		
Plumbing	Mared Mechanical	Kevin Jaqua	414-322-3769	414-536-0411		
Electric	Piper Electric	Wade Roberts		414-462-7700		
Painting	In House					
Carpentry	In House					
CG Work	In House					
Generators	N/A					
UPS	In House					
Elevator	Braun Thyssenkrupp			262-703-0500		
Janitorial	Coleman Cleaning	Gus Coleman	414-499-9961			gustav@colemanc.com
Security	Tactical Response	Tanner Sherid		262-221-6864		tacticalresponsepolice@gmail.com
Window Cleaning	In House					
Glass	Burleigh Glass			414-562-6700		
Snow Removal	Trees on the Move	Vinnie Nicols	262-745-2994	262-679-5200	262-679-5215	vinnie@treesonthemove.com
Landscape	In House					
Garbage	Waste Management	Jade Saline		414-358-1026		
Fire Alarm	Cintas Fire Protection	Garry Bredeson	262-781-9665			
Sprinkler Mnt.	Cintas Fire Protection	Garry Bredeson	262-781-9665			
Mat Rentals	N/A					
Locks & Keys	UnichLock Company	Ken Shaw	414-788-1064			
Signage	Sign A Rama	Jim		414-273-7446		
Pest Control	W/L-KI	Deanna	414-438-8420	800-236-8735		
Fire Extinguisher	Cintas	Garry Bredeson	262-227-9146	262-781-9965		
Emergency Lights	Cintas	Garry Bredeson	262-227-9146	262-781-9965		
Parking Lot Mnt.	In House					

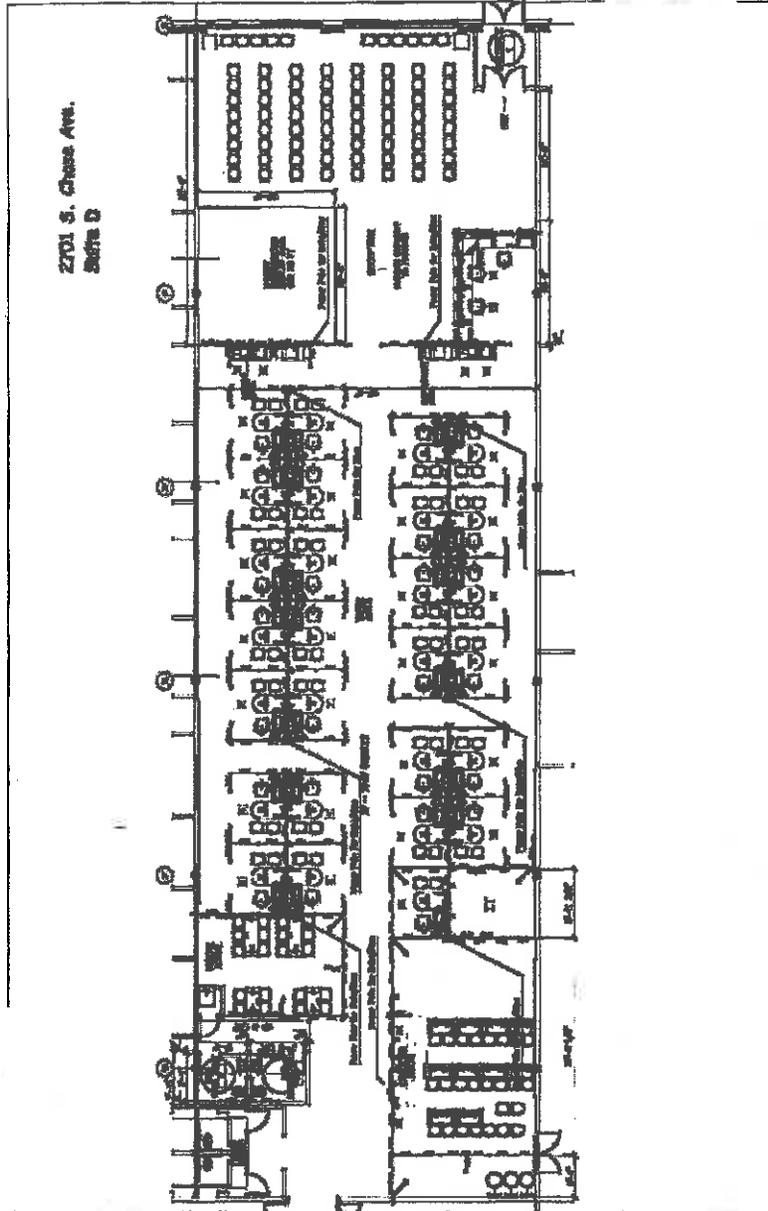
Food Service/ Energy/ VITA Floor Plan



Public Services Risk Assessment - 2701 S Chase, Suite D					
Potential Hazard	Probability How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact What impacts would this type of event have on your program and/or your community? Would it cause:	Impact Overall impact on your program?	Priority
Loss of phone system	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of computer access	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Damage to phone equipment buildings <input type="checkbox"/> Disruption of vital community services <input type="checkbox"/> Disruption of services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to environmental issues: Fire Flood Tornado Hurricane Severe storms	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to services: Electrical Gas Sewage issues	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	<input type="checkbox"/> Injury <input type="checkbox"/> Illness <input type="checkbox"/> Death <input type="checkbox"/> Damage to equipment or building contents <input type="checkbox"/> Damage to buildings <input type="checkbox"/> Disruption of services <input type="checkbox"/> Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

Energy/VITA Risk Assessment Cont.					
Potential Hazard	Feasibility How often has this event occurred in your area?	Probability How likely is it that this event will occur in the future?	Impact: When impacts could this type of event occur on your program include your community's ability to cope.	Overall Impact on your program?	Priority
Loss of access/space due to deliberate disruption; Bomb threats Explosions Sabotage Organized violence	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	Injury Illness Death Damage to equipment or building contents Damage to buildings Disruption of services Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH
Loss of access/space due to services/ systems/ security; Electric power failure HVAC Cyber-crime Breach of sensitive information I.T. systems failure	<input type="checkbox"/> Never <input type="checkbox"/> Occasionally <input type="checkbox"/> Yearly <input type="checkbox"/> Several times a year	<input type="checkbox"/> Not possible <input type="checkbox"/> Not very likely <input type="checkbox"/> Likely <input type="checkbox"/> Very likely	Injury Illness Death Damage to equipment or building contents Damage to buildings Disruption of services Disruption of vital community services	<input type="checkbox"/> None <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Severe	LOW MED HIGH

SOCIAL DEVELOPMENT COMMISSION Energy/VT Emergency Vendor List 2701 S Chase Street D						
Categories	Company Name	Contact Name	Cell Number	Fax Number	Phone Number	Email Address
Insurance	GBG Insurance, Inc	Charles Hillson		708-333-3378	708-333-3387	
HVAC	UMOS	Dana Springer		414-389-6000		chilson@gbgins.com
Plumbing	UMOS					
Electric	UMOS					
Painting	UMOS					
Carpentry	UMOS					
CG Work	UMOS					
Generators	N/A					
UPS	N/A					
Elevator	N/A					
Janitorial	In House					
Security	Tactical Response	Tanner Sherid		262-221-6864		tacticalresponsepolice@gmail.com
Window Cleaning	UMOS					
Glass	UMOS					
Snow Removal	UMOS					
Landscape	UMOS					
Garbage	Basic Disposal			414-761-3141		
Fire Alarm	UMOS					
Sprinkler Maint.	UMOS					
Mat Rentals	N/A					
Locks & Keys	UMOS					
Storage	Sign A Rama	Jim		414-273-7446		
Pest Control	Wtl-Kil	Deanna	414-438-8420	800-236-8735		
Fire Extinguisher	UMOS					
Emergency Lights	UMOS					
Furniture Lot Maint.	UMOS					



Section VII Program Alternative Location

In the event of a disaster, SDC has alternative facilities where key management and staff would resume providing services as necessary. Memorandums of Understanding will developed with alternative landlords for sites as needed. The chart below identifies site names and alternative sites:

Site Name	Contact Person	Alternative Location Note: Detailed information will be identified on the Memorandum of Understanding
Administrative Offices (Richards) <input type="checkbox"/> Executive <input type="checkbox"/> Accounting <input type="checkbox"/> Community Relations/Communication <input type="checkbox"/> Operations <input type="checkbox"/> Purchasing <input type="checkbox"/> IT <input type="checkbox"/> HRD <input type="checkbox"/> Audit Dept.	George Hinton Roy Marquez	Operations Manager/ Department will contact SDC's Tenant Representative to determine adequate location within 1 mile radius along a bus line; if another SDC location doesn't have adequate relocation space to house the displaced Program(s).
<input type="checkbox"/> Senior Companion (Richards)	Sandra White Mattie Payne	
<input type="checkbox"/> Energy Assistance (Richards)	Sandra White	
<input type="checkbox"/> GAIN (Richards)	Carey Courtney	
<input type="checkbox"/> VITA (Richards)	Elita Dunbar	
<input type="checkbox"/> Ways to Work		
<input type="checkbox"/> GED (Richards)	Priscilla Wallace	
<input type="checkbox"/> YFDP		
<input type="checkbox"/> Weatherization (Richards)	Jim Gambon	
<input type="checkbox"/> Lead/ NIP		
<input type="checkbox"/> Food Service (Teutonia)	Earl Guyton	
<input type="checkbox"/> Energy Assistance	Sandra White	
<input type="checkbox"/> Energy Assistance (Chase)	Sandra White	

Section VIII Systems Description

Information Technology

The Information Technology Department provides programs and administrative departments with a sound network infrastructure, PC and network operations, and telecommunications. IT manages and supports a variety of hardware and software applications including the data and telephone communications network, file, database and print servers, E-mail system, Cap60 database, and Blackbaud Financial Edge accounting software. IT manages the network, telephone, and voicemail system for all locations. IT is responsible for maintaining computing and telecommunications systems as necessary to support SDC's business activities.

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Network Infrastructure

The network infrastructure currently consists of a voice and data network which interconnects 3 remote locations via point-to-point T-1 connections on a fractional DS3 to the main Richards Street facility. CR-SDC currently uses ISDN-PRI voice services and analog lines at the Richards Street location and a variety of analog POTS and Centrex lines at its 14 remote locations. CR-SDC currently utilizes a 20 Mbs managed internet connection that is centrally located at the Richards Street facility to provide managed internet access for all locations.

Firewall Protection

The managed firewall service by Fortinet protects the network with a Firewall Appliance (FortiGate), E-Mail Relay Service (FortiMail), Network Intrusion Detection/Prevention, Virus & Spam Protection, as well as Web Content Filtering.

Internal Network

SDC's internal server network consists of 6 HP/Compaq Proliant 350 servers, each with a minimum of 2GB RAM, Dual Processors, and Raid 5 drive configurations (36-146GB); a Microsoft Exchange Server; and a Fax Server. All servers run Windows Server 2003. Unitrends is used for daily backups of file server data on all servers.

CAP60

CAP60 is our Integrated Services Delivery System. It is an agency-wide database application used to capture non-duplicated client information, make referrals to other programs within the agency; track and monitor Impact of services (service outcomes); and produce multiple reports to management, funders, and government agencies.

Financial Management Software

Our financial management software is Blackbaud's The Financial Edge and is running on an SQL database server. The Financial Edge is an account and financial management application designed for non-profit and governmental agencies. It gives us a business-oriented approach toward financial management and has modules for General Ledger, Accounts Payable, Payroll, Purchase Orders, Fixed Assets, and Budget Management.

Data Backup & Retention

Unitrends Backup Pro backup software is installed on all of the servers, and is configured to backup all data to the Unitrends backup storage appliance. Data from seven (7) servers is backed up onto the appliance daily.

Schedule

The current backup is scheduled to run every day. All backups are done as a full or incremental backup. Incremental backups are run every weekday, full backups run every Saturday, and a full hot bare metal backup is run every Sunday. An archive job that backs up the last full backup, last incremental backup, and last hot bare metal backup for each server onto the archive drive is scheduled to run every Monday. Backup jobs are scheduled to start no earlier than 7:00PM on weekdays and Saturday, or 3:00PM on Sunday. The archive job is scheduled to run every Monday at 8:10AM.

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Section IX DISASTER RECOVERY PROCEDURES

In the event of a disaster situation at any of the SDC locations, the Emergency Crisis Team will:

- 1. Provide employees with a safe alternative-working environment as needed**
- 2. Assure that an alternate facility will be available to ensure employee safety**
- 3. Alleviate the current problem at hand and provide continuous updates regarding the disaster and or progress**
- 4. Provide appropriate contact information to all employees affected by the disaster**
- 5. Alleviate the problem and provide continuous update regarding the crisis**

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Section X Glossary

Continuity of Operations Plan (COOP)	Document that describes the methods and procedures for recovering business operations from disaster scenarios.
Business Impact Analysis (BIA)	Measures the effect of resources loss and provides management with data upon which to base decisions on risk mitigation and continuity planning.
Disaster Recovery Plan (DRP)	The recovery of the IT systems infrastructure that supports the recovery of the business. The DRP is referred to by the Business Continuity Plan in order to completely recover the site business.
Facilities	Various sections of or entire structures that have been segregated into separate SDC service areas.
Emergency Procedures	Procedures that staff follow during evacuation drills and events.
Maximum Tolerable Outage (MTO)	The maximum period of time that business processes can operate before the loss of resources affects their operations.
Recovery Strategy	Approved course of action to be employed in response to a business disruption, interruption or disaster.
Recovery Point Objective (RPO)	The age of the data to be restored.
Recovery Time Objective (RTO)	The time needed to recover from a disaster.
Task Requirement	Activities required to be performed within the time frame by the responsible person.
Testing and Maintenance Schedule	Tested schedule to confirm the accuracy of the Disaster Recovery Plan.

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Section XI Appendices

1. Local Media Telephone Contacts
2. Employee Notification Form
3. Disaster Recovery Program – Response Check list
4. Damage Assessment Form
5. Recovery Status Report Form
6. Disaster Recovery Matrix
7. Training Schedule

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1. LOCAL MEDIA TELEPHONE AND FAX NUMBERS

Information regarding this area can be obtained through the following:

Television Stations	Telephone	Fax	Website Address
WISN - Channel 12	(414) 937-3331	(414) 342-7505	www.wisn.com
WFTL - Channel 6	(414) 353-6213	(414) 362-2161	www.myfoxmilwaukee.com
WTMJ - Channel 4	(414) 967-5318	(414) 967-5378	www.todaystmj4.com
WDFW - Channel 58	(414) 607-8340	(414) 777-5802	www.cbs58.com

AM Radio	Telephone	Fax	Website Address
WISN	(414) 545-8900	(414) 342-4734	www.newstalk30.com/main.html
WOKY	(414) 545-5920	(414) 545-4069	www.thebig920.com
WTMJ	(414) 967-5475	(414) 967-5298	www.620wimj.com
WMCS	(414) 444-1290	(414) 444-1409	www.1290wmcs.com
WNOV	(414) 449-9668	(414) 449-0945	www.wnov860.com

FM Radio	Telephone	Fax	Website Address
WML	(414) 545-8900	(414) 545-4069	www.fm106.com
WIMR	(414) 978-9000	(414) 978-9001	www.jammin98.3.com
WDDW	(414) 325-1800	(414) 607-1837	www.radiolagrande.com

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2. EMPLOYEE NOTIFICATION SCRIPT

In the event of a disaster situation at any of the SDC locations, the following message to the employees will be contacted through the Communication Team.

Employee Notification Script

Below is an example notification script for notifying staff and/or alters business interruption/ disaster impedes critical business functions. Contact the staff to inform them of work expectations.

This is _____
(Your Name- i.e., program manager)

The Date is _____, and the time is _____.
(Today's Date) (Current Time and Time Zone)

I am calling to inform you that, (Site Name) (Location, Street address, City and State) has been affected by a _____
(Give situation- business interruption/ disaster, crisis, or emergency)

I need you to:

- 1) Stay at home and wait for instructions
- 2) Go to _____
(Complete Recovery Site's name)
- 3) Call your staff and let them know to either:
 - a) Stay home and wait for instructions
 - b) Go to _____
(Complete Recovery Site's name)

3. **DISASTER RECOVERY PROGRAM SUPPLY LIST**

Disaster Recovery Program Supply List

Program Name _____
 Program Contact _____ Telephone Number _____

Days of Operation _____

Hours of Operation _____

Weekend Hours: Yes No

Number of Staff _____ Part Time _____ Full Time _____ Volunteers _____

Equipment Needed to Operate

Hardware:

Equipment Needed to Operate	Number Needed
Personal Computer(s)	
Telephone(s)	
Fax Machine(s)	
Network Printer (s)	
Personal Printer(s)	
Scanner(s)	

Software:

Microsoft Office	
Financial Edge with Web based Products	
Paycheck with Integration Tools interface	
Stromberg	
Adobe	

Other Equipment/ Supplies: _____

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4. DAMAGE ASSESSMENT REPORT

Damage Assessment Report

<input type="checkbox"/> Fire/ Flood <input type="checkbox"/> Explosion <input type="checkbox"/> Power failure/ Gas leak <input type="checkbox"/> Chemical hazards <input type="checkbox"/> Burglary <input type="checkbox"/> Agency closing - Other _____	Please Check applicable box
--	------------------------------------

1 Access/ Safety/ Security

- Open Access to Building
- Limited Access to Building- Explanation: _____

- No Safety Concerns
- Safety Concerns Explanations: _____

- No Security Concerns
- Security Concerns Explain: _____

- Other Concerns: _____

2 Structures

Walls

- No Visible Damage
- Visible Damage- Explain: _____

Floors

- No Visible Damage
- Visible Damage- Explain: _____

Ceilings

- No Visible Damage
- Visible Damage- Explain: _____

3 Equipment Damage

- | | | |
|------------------------------------|-----|----|
| <input type="checkbox"/> Destroyed | Yes | No |
|------------------------------------|-----|----|

Overview of damage: _____

5. RECOVERY STATUS REPORT

Recovery Status Report

Note: Please complete the form with the most current information that is available.

Person Name: _____ Department: _____

Date: _____

Time: _____

Location: _____

Employee health and safety:

No Issues: _____ or Assistance needed for: _____

Status or Condition: _____

Action Taken: _____

Department's risk of loss to the agency

Department's most critical function that is imperiled due to the incident

Status of the function's operation: _____

Department's recovery status

List any resources needed for the recovery that are not immediately available.

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6. DISASTER RECOVERY MATRIX

The following table identifies the links between potential events and disaster scenarios.

Disaster Recovery Matrix				
Disaster Scenario	Loss of Operations	Loss of Facilities	Loss of IT Systems	Loss of Equipment
Major Disaster				
Fire				
Environmental				
Gas				
Water				
Electricity				
Explosion				
Industrial Action				
Supply of material				
Equipment destruction/ breakdown				
IT Systems				
Death				
Threatening				
Sabotage				
Bomb threats				
Security breaches				
Printer				

7. TRAINING

Exercises will be conducted quarterly or as need in graduated complexity to include notification drills, tabletop exercises, and physical location exercises (as necessary).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug	Sept	Oct.	Nov.	Dec.
Calling tree drills												
On scene commander training												
COOP training												
Crisis training												
Behavior Reaction to crisis												
Evacuation drill												
CPR training												

SDC 2/14/2014

Re: Wheap

Jonathan M Howell <jhowell@esiwi.com>

Wed 5/27/2015 2:20 PM

To: Stewart, Cleo <Cleo.Stewart@milwaukeecountywi.gov>;

Good Afternoon Cleo,

I am requesting the current RFPs from community advocates, SDC and UMOS that have been submitted for the contract year FY 15/16. Please let me know when you have received this email and if you need anything from me. Thank you very much,

Jonathan M Howell

Sent from my iPhone

On Mar 10, 2015, at 12:36 PM, Stewart, Cleo <Cleo.Stewart@milwaukeecountywi.gov> wrote:

Hi Jon

The 2012 proposal has to be sent by several email because we can only send 26 KB.

Thanks

Cleo A. Stewart

Office Support Assistant II

Office: 414-289-5980

Fax: 414-289-8574

Cleo.Stewart@milwaukeecountywi.gov

This message is intended for the sole use of the individual and entity to which it is addressed, and may contain information that is privileged, confidential and exempt from disclosure under applicable law. If you are not the intended addressee, nor authorized to receive for the intended addressee, you are hereby notified that you may not use, copy, disclose or distribute to anyone the message or any information contained in the message. If you have received this message in error, please immediately advise the sender by reply email and delete the message.

<SDC 2012 RFP-1.pdf>

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

5/29/2015



MSD-001
Wisconsin Home Energy Assistance Program (WHEAP)

PART 2

BUDGET AND OTHER FINANCIAL INFORMATION

IRS FORM 990

Item #25

The Community Relations-Social Development Commission is a Community Action Agency with a quasi-government status and is not required to file an IRS Form 990. The Social Development Commission is a registered not-for-profit entity with a charitable mission. Attached is a copy of SDC's IRS Certificate of Registry.

DUPLICATE

Form 637 (Rev. Oct. 1955)	U. S. Treasury Department—Internal Revenue Service CERTIFICATE OF REGISTRY Manufacturer, Producer, or Vendor of Articles Taxable Under Chapter 32, Internal Revenue Code of 1954	Registry No. A-329319
-------------------------------------	--	--------------------------

OFFICE OF DISTRICT DIRECTOR OF INTERNAL REVENUE

Wisconsin, January 11, 1965

This certifies that Community Relations-Social Development Commission in Milwaukee County (Name)
 is a Instrumentality of the City of Milwaukee of articles, the sale or use of which is subject to tax (Manufacturer, producer, importer, wholesaler, jobber, or retailer)
 under Chapter 32, Internal Revenue Code of 1954, and has registered with the undersigned District Director of Internal Revenue with respect to the business located at 161 W. Wisconsin Ave.
Milwaukee, Wisconsin
 as required by Regulations 44 and 46, as revised.

Articles or parts of articles may be purchased tax free only in cases where a properly executed exemption certificate furnished the vendor by this registrant shows the registration number and the Internal Revenue District appearing on this certificate of registry.

H. S. Stempel
 District Director of Internal Revenue

By Harold Bell (Name) Chief Rec. & Admin. Section (Title)

WISCONSIN SALES AND USE TAX
CERTIFICATE OF EXEMPT STATUS (CES)
 (Governmental, Religious, Charitable, Scientific or Educational Organization)

Wisconsin Department of Revenue
 PO Box 8502
 Madison WI 53708-8502
 PHONE (608) 266-2776
 TDD (608) 267-1049

Sales to the below named organization are exempt from Wisconsin sales and use tax under sec. 77.75(1) and (9a), Wis. Stats.

This certificate is valid until revoked by the Wisconsin Department of Revenue.

Community Relations Social Development Commission in Milw 4041 N Richards St Milwaukee WI 53212	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;"> CES NUMBER 005258 </td> </tr> <tr> <td style="text-align: center;"> DATE ISSUED 8/24/64 </td> </tr> </table> <p>IMPORTANT: Sales to your organization are taxable unless you furnish your supplier with the CES number shown above. Sales by your organization may be subject to tax. If your organization makes taxable sales, it must obtain a seller's permit and remit sales tax to the Department of Revenue. Questions: Contact the Department of Revenue by telephone at our above number, FAX (608) 267-1030, E-mail sales10@dor.state.wi.us, or at our Web site www.dor.state.wi.us</p>	CES NUMBER 005258	DATE ISSUED 8/24/64
CES NUMBER 005258			
DATE ISSUED 8/24/64			

S-2041 (1.4-60)

**Community Relations – Social
Development Commission in
Milwaukee County**

Milwaukee, Wisconsin

Financial Statements and Supplementary Information

Including Independent Auditors' Report

As of and for the Year Ended December 31, 2013



Community Relations - Social Development Commission in Milwaukee County

Financial Statements and Supplementary Information
As of and for the Year Ended December 31, 2013

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 fax 414 777 5555
 baker.tilly.com

INDEPENDENT AUDITORS' REPORT

To the Board of Commissioners
 Community Relations-Social Development Commission
 in Milwaukee County
 Milwaukee, Wisconsin

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, the business-type activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Community Relations-Social Development Commission in Milwaukee County (the "Commission"), as of and for the year ended December 31, 2013, and the related notes to the financial statements, which collectively comprise the Community Relations-Social Development Commission's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control over financial reporting relevant to the Commission's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the Commission's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

To the Board of Commissioners
Community Relations-Social Development Commission
in Milwaukee County

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Commission, as of December 31, 2013 and the respective changes in financial position and, where applicable, cash flows thereof and the respective budgetary comparison for the Special Revenue Fund for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of Matter

As discussed in Note 1, the Commission adopted the provisions of GASB Statement No. 65, *Items Previously Reported as Assets and Liabilities*, effective January 1, 2013. Our opinions are not modified with respect to this matter.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis as listed in the table of contents be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Commission's basic financial statements. The departmental schedules as listed in the table of contents are presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the departmental schedules are fairly stated in all material respects, in relation to the basic financial statements as a whole.

To the Board of Commissioners
Community Relations-Social Development Commission

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated September 23, 2014 on our consideration of the Community Relations-Social Development Commission's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Community Relations-Social Development Commission's internal control over financial reporting and compliance.

Baker Tilly Vinson Krane, LLP

Milwaukee, Wisconsin
September 23, 2014

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

State and local governments, including Community Relations - Social Development Commission in Milwaukee County (SDC), must conform to Governmental Accounting Standards Board (GASB) Statement No. 34 as well as all other generally accepted accounting principles (GAAP). GASB 34 requires two additional financial reports - the statement of net position and the statement of activities. In addition, GASB 34 requires a Management's Discussion and Analysis, which is an overview of financial activities for the fiscal year.

Financial Highlights

- SDC's overall financial position, as reflected in total net position, decreased by \$549,931. Apart from the purchase and depreciation of grant-funded fixed assets, the financial position decreased by \$308,275.
- In governmental funds, the total fund balance decreased by \$268,698.

A synopsis of key financial activities for 2013 is as follows:

- On January 1, 2013, the indirect rate charged to programs was 12.5%.
- On December 10, 2013, the Board of Commissioners approved the 2014 budget.

Overview of the Financial Statements

The basic financial statements are comprised of (1) SDC's government-wide financial statements as required by GASB 34, (2) fund financial statements that comply with reporting to the Federal Government and other funding sources, and (3) notes to the financial statements. In addition, other information supplementary to the basic financial statements is provided.

Government-Wide Financial Statements

- SDC's government-wide financial statements are the statement of net position and the statement of activities. These statements present an aggregate view of SDC's finances in a manner similar to private-sector business. Both statements distinguish governmental activities from business-type activities.
- The statement of net position presents information on all of SDC's assets and liabilities with the difference between the two being reported as net position.
- The statement of activities presents information showing how SDC's net position changed during the year.
- SDC's government-wide financial statements are shown on pages 12 and 13 of this report.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Overview of the Financial Statements (Continued)

Fund Financial Statements

- SDC also produces fund financial statements. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities. SDC, like other state and local governments, uses fund accounting to demonstrate compliance with finance-related legal requirements. Fund financial statements generally report operations in more detail than SDC's government-wide statements.
- There are three fund financial statements: the balance sheet, the statement of revenue, expenditures, and changes in fund balances and the statement of cash flows.
- SDC has two kinds of funds: governmental and proprietary. Governmental funds include general and special revenue. SDC has two proprietary funds: one enterprise fund (food service) and one internal service fund (SD Properties).
- Financial information is presented separately on both the balance sheet and the statement of revenue, expenditures, and changes in fund balances for the general fund, special revenue fund, and enterprise fund, as these are considered to be major funds. Detailed data for each of the individual funds is provided separately as additional information. The governmental fund financial statements are on pages 14 through 17 of this report.
- SDC adopts an annual appropriated budget for its special revenue fund. A budgetary comparison statement has been provided to demonstrate compliance with this budget. The budgetary comparison statement is on page 18 of this report.
- The proprietary fund statements for SDC's food service projects are prepared on the same basis of accounting and measurement focus as SDC's government-wide financial statements. In addition, SDC provides a statement of cash flows for the proprietary fund. Proprietary fund statements are located on pages 19 – 21 of this report.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Overview of the Financial Statements (Continued)

Fund Financial Statements (Continued)

The major features of SDC's financial statements, including the portion of the activities reported and the type of information contained are shown in the table below.

	SDC's Government-Wide Statements	Governmental	Proprietary
Scope	Entire SDC.	The activities of SDC that are not proprietary such as governmentally funded special purpose programs and unrestricted funds.	Activities that SDC operates similar to private business. SDC's food service activity consists of proprietary operations.
Required Financial Statements	Statement of net position and statement of activities.	Balance sheet and statement of revenue, expenditures, and changes in fund balance.	Statement of net position, statement of revenue, expenses, and changes in net position, and statement of cash flows.
Basis of Accounting and Measurement Focus	Accrual accounting and economic resources focus.	Modified accrual accounting and current financial resources focus.	Accrual accounting and economic resources focus.
Type of Asset and Liability Information	All assets and liabilities, both financial and capital, short-term and long-term.	Generally includes assets expected to be used up and liabilities that come due during the year or soon thereafter. No capital assets or long-term liabilities included.	All assets and liabilities, both financial and capital; short-term and long-term.
Type of Inflow and Outflow Information	All revenue and expenses during the year, regardless of when cash is received or paid.	Revenue for which cash is received during or soon after the end of the year, expenditures when goods or services have been received and the related liability is due and payable.	All revenue and expenses during the year, regardless of when cash is received or paid.

Notes to the Financial Statements

The notes to the financial statements provide additional information that is essential to the full understanding of the data provided in SDC's government-wide and fund financial statements. The notes to the financial statements can be found beginning on page 22 of this report.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Financial Analysis

SDC as a Whole

Net Position

Table 1 provides a summary of SDC's net position for the year ended December 31, 2013, compared to 2012.

Table 1
Condensed Statement of Net Position

	Governmental Activities		Business-Type Activities		Total		Change 2012-2013
	2013	2012	2013	2012	2013	2012	
Current and other assets	\$ 3,507,051	\$ 5,495,964	\$ 124,950	\$ 108,805	\$ 3,632,001	\$ 5,604,769	-35.20%
Capital assets	519,076	811,555	-	-	519,076	811,555	-36.04%
Total assets	\$ 4,026,127	\$ 6,307,519	\$ 124,950	\$ 108,805	\$ 4,151,077	\$ 6,416,324	-35.30%
Other liabilities	\$ 2,525,057	\$ 4,220,789	\$ 4,774	\$ -	\$ 2,529,831	\$ 4,220,789	-40.06%
Long-term debt outstanding	254,931	274,514	-	-	254,931	274,514	-7.13%
Total liabilities	\$ 2,779,988	\$ 4,495,303	\$ 4,774	\$ -	\$ 2,784,762	\$ 4,495,303	-38.05%
Net position:							
Net investment in capital assets	\$ 264,145	\$ 537,041	\$ -	\$ -	\$ 264,145	\$ 537,041	-50.81%
Restricted	489,388	669,803	-	-	489,388	669,803	-26.94%
Unrestricted	492,606	605,372	120,176	104,030	612,782	709,402	-13.62%
Total net position	\$ 1,246,139	\$ 1,812,216	\$ 120,176	\$ 104,030	\$ 1,366,315	\$ 1,916,246	-28.70%

In governmental activities, total assets decreased by \$2,281,392. The decrease in administrative surplus (indirect cost) resulted in a decrease in cash balances.

Total liabilities decreased by \$1,715,315 resulting from a decrease in unearned revenue.

In business-type activities, net position increased by \$16,146 due to an increase in the number of contracts secured by the food service enterprise.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Financial Analysis (Continued)

SDC as a Whole (Continued)

Change in Net Position

Table 2 shows the changes in net position for the fiscal years 2013 and 2012.

	Governmental Activities		Business-Type Activities		Total	
	2013	2012	2013	2012	2013	2012
Revenue:						
Program Revenue:						
Operating grants and contributions	\$ 29,627,046	\$ 46,009,035	\$ -	\$ -	\$ 29,627,046	\$ 46,009,035
Charge for services	345,190	387,591	155,586	62,697	500,776	450,288
General revenue - other	10,479	25,027	-	-	10,479	25,027
Total revenue	29,982,715	46,421,653	155,586	62,697	30,138,301	46,484,350
Expenses:						
Child education	12,500,861	21,632,330	-	-	12,500,861	21,632,330
Community services	12,093,588	19,454,583	-	-	12,093,588	19,454,583
Energy assistance	1,796,388	1,921,382	-	-	1,796,388	1,921,382
Senior services	316,651	293,453	-	-	316,651	293,453
Food programs	3,030,449	3,230,178	-	-	3,030,449	3,230,178
Housing activities	661,035	106,190	-	-	661,035	106,190
Depreciation - unassigned	149,820	137,556	-	-	149,820	137,556
Food service enterprise	-	-	139,440	94,029	139,440	94,029
Total expenses	30,548,792	46,775,672	139,440	94,029	30,688,232	46,869,701
Changes in net position	(566,077)	(354,019)	16,146	(31,332)	(549,931)	(385,351)
Net position - beginning	1,812,216	2,166,235	104,030	135,362	1,916,246	2,301,597
Net position - ending	\$ 1,246,139	\$ 1,812,216	\$ 120,176	\$ 104,030	\$ 1,366,315	\$ 1,916,246

As shown, grants from federal, state, and local governments provide about 99% of the funding for governmental activities. In the prior year, grant revenue provided approximately 99% of funding. SDC does not rely on property taxes for any activities.

- Program revenue for governmental activities, in the form of charges for services and operating grants and contributions, accounted for most of SDC's total revenue of \$29,982,715. This is a decrease of \$ 16,438,938 over the prior year for governmental activities and an increase of \$92,889 for business-type activities.
- Expenses decreased \$16,226,880 for governmental activities and increased by \$45,411 for business-type activities.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Financial Analysis (Continued)

Governmental Activities

Net Cost of Governmental Activities

Table 3 reports the cost of six major SDC activities. The table also shows each activity's net cost (total cost less grants and fees generated by the activities).

Table 3
Net Cost of Governmental Activities

	Total Cost of Services		Net Cost of Services	
	2013	2012	2013	2012
Child education	\$ 12,500,861	\$ 21,632,330	\$ (140)	140
Community services	12,093,588	19,454,583	(249,289)	(7,935)
Energy assistance	1,796,388	1,921,382	(9,406)	(6,315)
Senior services	316,651	293,453	-	-
Food programs	3,030,449	3,230,178	(167,689)	(227,380)
Housing activities	661,035	106,190	(212)	-
Totals	\$ 30,398,972	\$ 46,638,116	\$ (426,736)	\$ (241,490)

- The total cost of all governmental activities decreased \$16,239,144 as a result of the discontinuing of two major programs.

Business-Type Activities

Revenue for SDC's business-type activity (food service program) was comprised of charges for services (see Table 2).

- Charges for services, which are amounts paid by patrons for food services, increased from \$62,797 for 2012 to \$155,586 for 2013.

Governmental Funds

SDC completed the year with a total governmental fund balance of \$1,173,771, \$268,698 less than last year's ending fund balance of \$1,442,469.

The general fund had a decrease in fund balance of \$75,217 compared to an \$18,320 decrease in 2012.

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Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Financial Analysis (Continued)

Budgetary Highlights

- The special revenue fund incurred costs less than budgeted amounts by \$9,023,727. This was offset by grant revenues less than budget by \$9,068,256, for a total fund balance decrease of \$268,698.

Capital Asset and Debt Administration

Capital Assets

At the end of the 2013 fiscal year, SDC had invested \$3,116,497 in a range of capital assets, including: land, buildings and improvements, vehicles, furniture, and equipment (see Table 4). Total accumulated depreciation on these assets was \$2,597,421. This amount represents a net decrease of \$292,479. Additional information about capital assets can be found in Note 3, page 38.

- SDC recognized depreciation expense of \$241,656 for governmental activities.

Table 4
Capital Assets

	Governmental Activities		% Change
	2013	2012	
Land	\$ 84,550	\$ 84,550	0.00%
Buildings	451,680	451,680	0.00%
Leasehold improvements	497,575	817,970	(39.17%)
Furniture and equipment	2,082,692	2,860,880	(27.20%)
Accumulated depreciation	(2,597,421)	(3,403,525)	(23.68%)
Totals	\$ 519,076	\$ 811,555	(36.04%)

Long-Term Debt

At year-end, SDC had \$254,931 in notes payable outstanding, a decrease of \$19,582 from last year. Additional information about SDC's notes payable is presented in Note 11 to the financial statements on pages 41 and 42.



Community Relations - Social Development Commission in Milwaukee County

Management's Discussion and Analysis (unaudited)
As of and for the Year Ended December 31, 2013

Factors Bearing on SDC's Future (Continued)

Funding Levels

In 2013 SDC was not successful in the renewal of the State and Federal Head Start contracts resulting in a loss of approximately \$20,000,000 of grant revenue, 50% of the SDC annual operating budget. SDC adjusted staff levels and modified operating systems to support a smaller organization.

Strategic Plan

In the fall of 2014 SDC will embark on an agency wide strategic planning process. Upon completion of the process SDC will be in a position to make fundamental decisions and actions that shape and guide what the organization is, what it does, and why it does it, with a focus on the future.

Focusing On Outcomes

SDC funders are moving more towards sustainable outcome based funding strategies. To meet these requirements, in 2014 SDC will implement the CAP 60 customer management system. This system will allow SDC to carefully manage agency programs on a case by case basis, insuring complete conformity to internal protocols and regulations, in addition to meeting all organizational and community needs. The web-based system is designed to exceed federal, state and local standards.

Organizational Culture

SDC will create a strong workforce culture making it easier for the organization to stay focused, define goals, and deliver on those goals.

Contacting SDC's Financial Management

This financial report is designed to provide our citizens, taxpayers, customers, and investors and creditors with a general overview of SDC's finances and to demonstrate SDC's accountability for the money it receives. If you have questions about this report or need additional financial information, contact George Hinton, Chief Executive Officer, Community Relations - Social Development Commission in Milwaukee County, 4041 North Richards Street, Milwaukee, Wisconsin 53212.

Community Relations - Social Development Commission in Milwaukee County

Exhibit I
Statement of Net Position
As of December 31, 2013

	Primary Government			Component Unit- SD Foundation
	Governmental Activities	Business-Type Activities	Total	
Assets:				
Cash	\$ 454,806	\$ -	\$ 454,806	\$ 8,429
Restricted cash	926,974	-	926,974	-
Receivables:				
Due from grantor agencies	1,638,913	-	1,638,913	-
Other accounts receivable	539,229	672	539,901	53,965
Internal balances	(124,278)	124,278	-	-
Inventory	37,996	-	37,996	-
Prepaid items	33,411	-	33,411	-
Beneficial interest - Greater Milwaukee Foundation	-	-	-	117,540
Capital Assets not being depreciated	84,550	-	84,550	-
Capital Assets being depreciated, net	434,526	-	434,526	-
Total assets	\$ 4,026,127	\$ 124,950	\$ 4,151,077	\$ 179,934
Liabilities:				
Accounts payable	\$ 804,418	\$ -	\$ 804,418	\$ 150
Line of credit	425,000	-	425,000	-
Accrued liabilities	426,073	-	426,073	416
Unearned revenue	869,566	4,774	874,340	1,560
Long-term liabilities:				
Due within one year	26,264	-	26,264	-
Due in more than one year	228,667	-	228,667	-
Total liabilities	2,779,988	4,774	2,784,762	2,126
Net position:				
Net investment in capital assets	264,145	-	264,145	-
Restricted for grant programs	489,388	-	489,388	-
Unrestricted	492,606	120,176	612,782	177,808
Total net position	1,246,139	120,176	1,366,315	177,808
Total liabilities and net position	\$ 4,026,127	\$ 124,950	\$ 4,151,077	\$ 179,934

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SEE ACCOMPANYING NOTES TO FINANCIAL STATEMENTS.
MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 89

Community Relations - Social Development Commission in Milwaukee County

Exhibit II
Statement of Activities
For the Year Ended December 31, 2013

Functions/Programs	Program Expenses		Program Revenue		Net (Expense) Revenue and Changes in Net Position			Component Unit - SD Foundation
	Expenses	Indirect Expenses Allocation	Operating Grants and Contributions	Capital Grants and Contributions	Charges for Services	Governmental Activities	Business-Type Activities	
Governmental activities:								
Child education	\$ 1,111,424	\$ 1,389,437	\$ 12,371,728	\$ -	\$ 128,993	\$ (140)	\$ -	\$ (140)
Community services	10,771,848	1,321,740	11,773,530	-	70,769	(249,289)	-	(249,289)
Energy assistance	1,596,789	199,599	1,786,447	-	535	(9,406)	-	(9,406)
Senior services	304,506	12,145	316,651	-	-	-	-	-
Food programs	2,693,752	336,717	2,752,253	-	110,507	(167,689)	-	(167,689)
Housing activities	587,201	73,834	626,437	-	34,386	(212)	-	(212)
Depreciation - unassigned	149,820	-	149,820	-	-	(149,820)	-	(149,820)
Total governmental activities	27,215,320	3,333,472	29,627,046	-	345,190	(576,556)	-	(576,556)
Business-type activities:								
Food services	139,440	-	-	-	155,586	-	16,146	16,146
Total business-type activities	139,440	-	-	-	155,586	-	16,146	16,146
Total primary government	\$ 27,354,760	\$ 3,333,472	\$ 29,627,046	\$ -	\$ 500,776	(576,556)	16,146	(580,410)
Component unit - SD Foundation	\$ 220,791	\$ 7,840	\$ 228,631	\$ 255,633	\$ -	\$ -	\$ 10,479	\$ 27,004
General revenue:								
Other income								
Change in net position								
Net position - December 31, 2012								
Net position - December 31, 2013								

See accompanying notes to financial statements.

Community Relations - Social Development Commission in Milwaukee County

Exhibit III
Balance Sheet - Governmental Funds
As of December 31, 2013

	General	Special Revenue	Totals
Assets:			
Cash	\$ 454,806	\$ -	\$ 454,806
Restricted cash	-	926,974	926,974
Receivables:			
Due from grantor agencies	-	1,638,913	1,638,913
Other accounts receivable	29,613	483,028	512,641
Due from other funds	1,250,464	795,254	2,045,718
Inventory	-	35,535	35,535
Prepaid items	20,033	8,271	28,304
Total assets	\$ 1,754,916	\$ 3,887,975	\$ 5,642,891
Liabilities:			
Accounts payable	\$ 39,162	\$ 585,359	\$ 624,521
Accrued liabilities	295,272	99,915	395,187
Unearned revenue	278,999	561,510	840,509
Due to other funds	-	2,183,903	2,183,903
Line of credit	425,000	-	425,000
Total liabilities	1,038,433	3,430,687	4,469,120
Fund balances (deficit):			
Nonspendable for inventory and prepaid items	20,033	43,806	63,839
Restricted for grant programs	-	471,508	471,508
Unassigned (deficit)	696,450	(58,026)	638,424
Total fund balances	716,483	457,288	1,173,771
Total liabilities and fund balances	\$ 1,754,916	\$ 3,887,975	\$ 5,642,891

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See accompanying notes to financial statements.
MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 91

Community Relations - Social Development Commission in Milwaukee County

Exhibit IV Reconciliation of Balance Sheet - Governmental Funds to the Statement of Net Position As of December 31, 2013

Total fund balance - governmental funds		\$ 1,173,771
<p>Total net position reported to governmental activities in the statement of net position are different from the amount reported above as total governmental funds balance because:</p>		
<p>Capital assets used in government activities are not financial resources and, therefore, are not reported in the fund statements. Amounts reported for governmental activities in the statement of net position are:</p>		
Governmental capital assets	1,038,495	
Governmental accumulated depreciation	<u>(999,626)</u>	
		38,869
<p>Net position in the internal service fund, which is not included in the governmental fund types:</p>		
Net position in the internal service fund		<u>33,499</u>
Total net position - governmental activities		<u>\$ 1,246,139</u>

Community Relations - Social Development Commission in Milwaukee County

Exhibit V
Statement of Revenue, Expenditures, and
Changes in Fund Balances - All Governmental Funds
For the Year Ended December 31, 2013

	General	Special Revenue	Total
Revenue:			
Federal, state, and local grants	\$ -	\$ 29,475,548	\$ 29,475,548
Other	10,479	496,688	507,167
Total revenue	10,479	29,972,236	29,982,715
Expenditures:			
Child education	-	12,500,861	12,500,861
Community services	85,696	11,405,864	11,491,560
Energy assistance	-	1,796,388	1,796,388
Senior services	-	316,651	316,651
Food programs	-	3,030,449	3,030,449
Various programs	-	454,469	454,469
Housing activities	-	661,035	661,035
Total expenditures	85,696	30,165,717	30,251,413
Excess (deficiency) of revenue over expenditures	(75,217)	(193,481)	(268,698)
Beginning fund balance	791,700	650,769	1,442,469
Ending fund balance	\$ 716,483	\$ 457,288	\$ 1,173,771

Community Relations - Social Development Commission in Milwaukee County

Exhibit VI Reconciliation of Statement of Revenue, Expenditures, and Changes in Fund Balances of Governmental Funds to the Statement of Activities For the Year Ended December 31, 2013

Net change in fund balances - total governmental funds	\$ (268,698)
Amounts reported for governmental activities in the statement of activities are different because:	
The acquisition of capital assets are reported in the governmental funds as expenditures. However, for governmental activities, those costs are shown in the statement of net position and allocated over their estimated useful lives as annual depreciation expenses in the statement of activities.	
Depreciation expense reported in the statement of activities	(149,820)
Internal service funds are used by management to charge the costs of certain activities, such as building occupancy costs, insurance, and security to other funds. The excess of revenue over expenses is a decrease of expenses in governmental activities.	<u>(147,559)</u>
Change in net position - governmental activities	<u>\$ (566,077)</u>

~~See accompanying notes to financial statements.~~ 17
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Community Relations - Social Development Commission in Milwaukee County

Exhibit VII
Statement of Revenue, Expenditures, and Changes in Fund Balance -
Actual and Budget - Special Revenue Fund
For the Year Ended December 31, 2013

	Actual	Original and Final Budget	Variance - Favorable (Unfavorable)
Revenue	\$ 29,972,236	\$ 39,040,492	\$ (9,068,256)
Expenditures	(30,165,717)	(39,189,444)	9,023,727
Excess (deficiency) of revenue over expenditures	(193,481)	(148,952)	(44,529)
Beginning fund balance	650,769	650,769	-
Ending fund balance	\$ 457,288	\$ 501,817	\$ (44,529)

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See accompanying notes to financial statements.
MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 95

Community Relations - Social Development Commission in Milwaukee County

Exhibit VIII
Statement of Net Position - Proprietary Funds
As of December 31, 2013

	<u>Business-Type Activities - Enterprise Fund</u>	<u>Governmental Activities - Internal Service Funds</u>
	Food Service	
Assets:		
Current assets:		
Accounts receivable	\$ 672	\$ 26,588
Due from other funds	124,278	397,805
Inventory	-	2,461
Prepaid expenses	-	5,107
Total current assets	124,950	431,961
Non-current assets:		
Land	-	84,550
Buildings and equipment, net	-	395,657
Total non-current assets	-	480,207
Total assets	\$ 124,950	\$ 912,168
Liabilities:		
Current liabilities:		
Accounts payable	\$ -	\$ 179,897
Accrued liabilities	-	30,886
Unearned revenue	4,774	29,057
Due to other funds	-	383,898
Current portion of notes payable	-	26,264
Total current liabilities	4,774	650,002
Long-term liabilities:		
Notes payable	-	228,667
Total liabilities	4,774	878,669
Net position:		
Net investment in capital assets	-	225,276
Unrestricted (deficit)	120,176	(191,777)
Total net position	120,176	33,499
Total liabilities and net position	\$ 124,950	\$ 912,168

See accompanying notes to financial statements. 19
MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 96

Community Relations - Social Development Commission in Milwaukee County

Exhibit IX

Statement of Revenue, Expenses, and Changes in Net Position - Proprietary Funds
For the Year Ended December 31, 2013

	Business-Type Activities <u>Enterprise Funds</u> Food Service	Governmental Activities - Internal Service Funds
Revenue:		
Charges for services and other	\$ 155,586	\$ 1,650,505
Operating expenses:		
Salaries and wages	41,633	231,685
Fringe benefits	13,513	87,999
Contractual	223	87,143
Training	-	-
Travel	50	496
Occupancy and building depreciation	8,012	1,173,297
Equipment maintenance and depreciation	5,046	56,896
Consumable supplies	7,133	60,222
Participant assistance	58,239	-
Other	5,591	87,631
Indirect costs	-	-
Total operating expenses	139,440	1,785,369
Operating income (loss)	16,146	(134,864)
Nonoperating expenses-interest	-	12,695
Change in net position	16,146	(147,559)
Beginning net position	104,030	181,058
Ending net position	\$ 120,176	\$ 33,499

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See accompanying notes to financial statements.
MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 97

Community Relations - Social Development Commission in Milwaukee County

Exhibit X
Statement of Cash Flows - Proprietary Funds
For the Year Ended December 31, 2013

	Enterprise Fund	Internal Service Funds	Total
Cash flows from operating activities:			
Cash received for charges to programs	\$ -	\$ 1,650,505	\$ 1,650,505
Cash received for meals served	155,586	-	155,586
Cash payments for salaries and fringe benefits	(55,146)	(293,888)	(349,034)
Cash payments for services and supplies	(100,440)	(1,309,531)	(1,409,971)
Net cash provided by operating activities	-	47,086	47,086
Cash flows from capital and related financing activities:			
Purchase of equipment and leasehold improvements	-	(14,808)	(14,808)
Interest paid	-	(12,695)	(12,695)
Payment of notes payable	-	(19,583)	(19,583)
Net cash used by capital and related financing activities	-	(47,086)	(47,086)
Change in cash	-	-	-
Cash - December 31, 2012	-	-	-
Cash - December 31, 2013	\$ -	\$ -	\$ -
Reconciliation of operating income (loss) to net cash used in operating activities:			
Operating income (loss)	\$ 16,146	\$ (134,864)	\$ (118,718)
Adjustments to reconcile operating income (loss) to net cash provided by operating activities:			
Depreciation and amortization	-	157,467	157,467
Changes in operating assets and liabilities:			
Prepaid expenses and inventory	-	92,508	92,508
Due to/from other funds	(16,145)	(81,466)	(97,611)
Accounts payable	-	(12,355)	(12,355)
Unearned revenue	(1)	-	(1)
Accrued liabilities	-	25,796	25,796
Net cash provided by operating activities	\$ -	\$ 47,086	\$ 47,086

See accompanying notes to financial statements. MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 98 21

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies

Introduction

The financial statements of Community Relations - Social Development Commission in Milwaukee County (SDC) conform to accounting principles generally accepted in the United States of America as applicable to governmental units. The accepted standard-setting body for establishing governmental accounting and financial reporting principles is the Governmental Accounting Standards Board (GASB).

The accounting and reporting framework and the more significant accounting principles and practices are discussed in subsequent sections of this note. The remainder of the notes are organized to provide explanations, including required disclosures of SDC's financial activities for the year ended December 31, 2013.

Reporting Entity

SDC was created in 1963 as an Intergovernmental Public Commission under Section 66.0125 of the Wisconsin State Statutes. In 1964, SDC was designated as the Community Action Agency for Milwaukee County. Commission members represent three sectors of the community - the public sector, with representatives from the City of Milwaukee, Milwaukee County, Milwaukee Public Schools, and Milwaukee Area Technical College; low-income representatives from six geographically designated areas of the County; and representatives from the private sector, representing business, labor, the religious community, and private charitable organizations.

SDC is an intergovernmental planning and programming organization, which studies human problems, proposes solutions, and delivers services to help low-income people to become independent and self-reliant. As the Community Action Agency, SDC is responsible for coordinating and implementing federal anti-poverty programs in Milwaukee County. SDC receives federal Head Start funds, which comprises approximately 47% of overall program revenue in the year ended December 31, 2013.

The financial statements of the reporting entity include those of SDC, the primary government, its blended component unit and its discretely presented component unit.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Reporting Entity (Continued)

Component units are legally separate organizations for which the primary government is financially accountable or other organizations for which the nature and significance of their relationship with the primary government are such that their exclusion would cause the reporting entity's financial statements to be misleading. The primary government is financially accountable if (1) it appoints a voting majority of the organization's governing body and it is able to impose its will on that organization, (2) it appoints a voting majority of the organization's governing body and there is a potential for the organization to provide specific financial benefits to, or impose specific financial burdens on, the primary government, (3) the organization is fiscally dependent on and there is a potential for the organization to provide specific financial benefits to, or impose specific financial burdens on, the primary government. Certain legally separate, tax exempt organizations should also be reported as a component unit if all of the following criteria are met: (1) the economic resources received or held by the separate organization are entirely or almost entirely for the direct benefit of the primary government, its component units, or its constituents; (2) the primary government or its component units, is entitled to, or has the ability to access, a majority of the economic resources received or held by the separate organization; and (3) the economic resources received or held by an individual organization that the primary government, or its component units, is entitled to, or has the ability to otherwise access, are significant to the primary government.

Component units are reported using one of two methods, discrete presentation or blending. Generally, component units should be discretely presented in a separate column in the financial statements. A component unit should be reported as part of the primary government using the blending method if it meets any one of the following criteria: (1) the primary government and the component unit have substantively the same governing body and a financial benefit or burden relationship exists, (2) the primary government and the component unit have substantively the same governing body and management of the primary government has operational responsibility for the component unit, (3) the component unit serves or benefits, exclusively or almost exclusively, the primary government rather than its citizens, or (4) the total debt of the component unit will be paid entirely or almost entirely from resources of the primary government.

The blended component unit, SD Properties, Inc., is included in SDC's reporting entity due to the significance of its operational and financial relationship with SDC. SD Properties, Inc. was established in 2002 as a nonprofit organization. SD Properties, Inc.'s purpose is to own property that is rented to SDC. The Board of Directors of SD Properties consists of three individuals appointed to that position by the Chairperson of the Board of Commissioners of SDC whose appointment has been confirmed by the Board of Commissioners of SDC. Activities relating to SD Properties, Inc. are included in the internal service fund. The SD Properties, Inc. does not issue separate financial statements.

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MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 100

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements

As of and for the Year Ended December 31, 2013

The discretely presented component unit, SD Foundation, is reported in a separate column to emphasize that it is a legally separate unit from SDC. The SD Foundation was established in 2003 as a nonprofit organization. SD Foundation's purpose is to provide financial support to SDC by obtaining grant awards and through fund-raising activities. The SD Foundation consists of a separate board of directors made up of a minimum of 10 and a maximum of 20 individuals. The SDC Chief Executive Officer and the SDC Board of Commissioners Resource Committee Chair serve as ad-hoc members. The SD Foundation does not issue separate financial statements.

Basis of Presentation

In March 2012, the GASB issued statement No. 65 - Items Previously Reported as Assets and Liabilities. This statement establishes accounting and financial reporting standards that reclassify, as deferred outflows of resources or deferred inflows of resources, certain items that were previously reported as assets and liabilities and recognizes, as outflows of resources or inflows of resources, certain items that were previously reported as assets and liabilities. This standard was implemented effective January 1, 2013 and had no significant effect on the financial statements.

Government-Wide Financial Statements

The statement of net position and statement of activities display information about the reporting government as a whole. They include all funds of the reporting entity except for fiduciary funds. The statements distinguish between governmental and business-type activities. Governmental activities are financed through intergovernmental revenues, and other nonexchange revenues. Business-type activities are financed in whole or in part by fees charged to external parties for goods or services. Likewise, the primary government is reported separately from certain legally separate component units for which the primary government is financially accountable.

The statement of activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment. Indirect expenses are common purpose costs benefiting more than one function or segment. Indirect expenses are allocated based on an indirect cost allocation plan approved by SDC's cognizant agency. Program revenues include 1) charges to customers or applicants who purchase, use or directly benefit from goods, services, or privileges provided by a given function or segment, and 2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Other items not included among program revenues, including interest income, are reported as general revenues. Internally dedicated resources are reported as general revenues rather than as program revenues.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Basis of Presentation (Continued)

Fund Financial Statements

Financial statements of the reporting entity are organized into funds, each of which is considered to be a separate accounting entity. Each fund is accounted for by providing a separate set of self-balancing accounts, which constitute its assets, deferred outflows of resources, liabilities, deferred inflows of resources, net position/fund equity, revenues, and expenditures/expenses.

Funds are organized as major funds or nonmajor funds within the governmental and proprietary statements. An emphasis is placed on major funds within the governmental and proprietary categories. A fund is considered major if it is the primary operating fund of SDC or meets the following criteria:

- a. Total assets, liabilities, revenues or expenditures/expenses of that individual governmental or enterprise fund are at least 10% of the corresponding total for all funds of that category or type, and
- b. The same element of the individual governmental or enterprise fund that met the 10% test is at least 5% of the corresponding total for all governmental and enterprise funds combined.
- c. In addition, any other governmental or enterprise fund that SDC believes is particularly important to financial statement users may be reported as a major fund.

Separate financial statements are provided for governmental funds and proprietary funds. Major individual governmental funds and major individual enterprise funds are reported as separate columns in the fund financial statements.



Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 **Summary of Significant Accounting Policies (Continued)**

Basis of Presentation (Continued)

Fund Financial Statements (Continued)

SDC reports the following major governmental funds:

General Fund

The general fund is the operating fund of SDC. It is used to account for and report all financial resources, except those accounted for and reported in another fund.

Special Revenue Fund

Special revenue funds are used to account for and report the proceeds of specific revenue sources that are legally restricted or committed to expenditures for specified purposes (other than debt service or capital projects).

SDC reports the following major enterprise fund:

Food Service Fund

Enterprise funds are used to account for programs, which are financed primarily by user charges or fixed bid arrangements, where the intent of SDC is that the costs of providing services to the low-income community on a continuing basis be financed or recovered through a fee or service charge.

In addition, SDC reports the following fund type:

Internal Service Fund

The internal service fund is used to account for services provided by one department to other departments of SDC on a cost-reimbursement basis, principally relating to building and administrative services. The internal service fund includes activities of SD Properties, Inc., a blended component unit.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 **Summary of Significant Accounting Policies (Continued)**

Measurement Focus, Basis of Accounting, and Basis of Presentation

Government-Wide Financial Statements

The government-wide statement of net position and statement of activities are reported using the economic resources measurement focus and the accrual basis of accounting. Under the accrual basis of accounting, revenues are recognized when earned and expenses are recorded when the liability is incurred or economic asset used. Revenues, expenses, gains, losses, assets, and liabilities resulting from exchange and exchange-like transactions are recognized when the exchange takes place. Nonexchange transactions, in which SDC gives or receives value without directly receiving or giving equal value in exchange, include grants and donations. Interest earnings on temporary investments are recognized in the fiscal period earned.

As a general rule, the effect of interfund activity has been eliminated from the government-wide financial statements. Exceptions to this general rule are charges between SDC's food service fund and various other functions of the government. Elimination of these charges would distort the direct costs and program revenues reported for the various functions concerned.

Fund Financial Statements

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recorded when they are both measurable and available. Available means collectible within the current period or soon enough thereafter to be used to pay liabilities of the current period. For this purpose, SDC considers revenues to be available if they are collected within 60 days of the end of the current fiscal period or if the grant program is ending. Expenditures are recorded when the related fund liability is incurred, except for unmatured interest on long-term debt, claims, judgments, compensated absences, and pension expenditures, which are recorded as a fund liability when expected to be paid with expendable available financial resources.

Intergovernmental aids and grants are recognized as revenues in the period SDC is entitled the resources and the amounts are available. Amounts owed to SDC which are not available are recorded as receivables and unavailable/unearned revenues. Amounts received before eligibility requirements (excluding time) are met are recorded as liabilities. Amounts received in advance of meeting time requirements are recorded as deferred inflows.

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Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 **Summary of Significant Accounting Policies (Continued)**

Measurement Focus, Basis of Accounting, and Basis of Presentation (Continued)

Fund Financial Statements (Continued)

Proprietary and fiduciary fund financial statements are reported using the economic resources measurement focus and the accrual basis of accounting, as described previously in this note.

The proprietary funds distinguish operating revenues and expenses from nonoperating items. Operating revenues and expenses generally result from providing services and producing and delivering goods in connection with a proprietary fund's principal ongoing operations. The principal operating revenues of the water utility are charges to customers for sales and services. Operating expenses for proprietary funds include the cost of sales and services, administrative expenses, and depreciation on capital assets. All revenues and expenses not meeting this definition are reported as nonoperating revenues and expenses.

All Financial Statements

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenditures/expenses during the reporting period. Actual results could differ from those estimates.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 **Summary of Significant Accounting Policies (Continued)**

Cash and Investments

For purposes of the statement of cash flows, SDC considers all highly liquid investments with an initial maturity of three months or less when acquired to be cash equivalents.

Investment of SDC funds is governed by the investment policy approved by the Board of Commissioners. Available investments are limited to:

- a. Federally-insured certificates of deposit, not to exceed the FDIC insurance limit, including interest, at commercial banks or savings and loan institutions.
- b. U.S. Treasury securities and securities of Federal agencies and instrumentalities.
- c. Repurchase agreements with financial institutions collateralized by U.S. Treasury or Federal agency securities.
- d. Money market funds that invest in securities approved under the guidelines of the investment policy.
- e. State of Wisconsin Local Investment Pool.

The investment policy does not address custodial credit risk, credit risk or interest rate risk.

Investments are stated at fair value, which is the amount at which an investment could be exchanged in a current transaction between willing parties. Fair values are based on quoted market prices. No investments are reported at amortized cost. Adjustments necessary to record investments at fair value are recorded in the operating statement as increases or decreases in investment income. Investment income on commingled investments of municipal accounting funds is allocated based on average balances. The difference between the bank statement balance and carrying value is due to outstanding checks and/or deposits in transit.

The Wisconsin Local Government Investment Pool (LGIP) is part of the State Investment Fund (SIF), and is managed by the State of Wisconsin Investment Board. The SIF is not registered with the Securities and Exchange Commission, but operates under the statutory authority of Wisconsin Chapter 25. The SIF reports the fair value of its underlying assets annually. Participants in the LGIP have the right to withdraw their funds in total on one day's notice. At December 31, 2013, the fair value of SDC's share of the LGIP's assets was substantially equal to the amount as reported in these statements.

See Note 2 for further information.

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MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 106

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Receivables

During the course of operations, transactions occur between individual funds that may result in amounts owed between funds. Short-term interfund loans are reported as "due to and from other funds." Interfund receivables and payables between funds within governmental activities are eliminated in the statement of net position. Any residual balances outstanding between the governmental activities and business-type activities are reported in the governmental-wide financial statements as internal balances.

Accounts receivable have been shown net of an allowance for uncollectible accounts, if needed. All amounts are expected to be collected within one year.

Inventories and Prepaid Items

Governmental and proprietary fund inventories, if material, are recorded at cost based on the FIFO method using the purchases method of accounting. These inventory items are generally used for operations and maintenance work and are not for resale. They are valued at cost based on FIFO, and charged to operation and maintenance expense when used.

Certain payments to vendors reflect costs applicable to future accounting periods and are recorded as prepaid items in both government-wide and fund financial statements.

Advances to Subgrantees

Advances to subgrantees represent funds advanced to subrecipient agencies in anticipation of those agencies providing future services to SDC. These amounts are returnable to SDC if the subrecipient agency is unable to provide the service.

Capital Assets

Capital assets, which include property, plant and equipment, are reported in the government-wide financial statements. Capital assets purchased with unrestricted funds are capitalized at cost when purchased. Maintenance and repair costs are charged to operations as incurred whereas renovations and improvements are capitalized. The assets are depreciated on a straight-line basis over their economic useful lives.

Capital assets purchased with grant award funds are recorded as an expense in the governmental special revenue fund at the time of purchase. The assets purchased with grant award funds are owned by SDC while used in the programs for which they were purchased or in other future authorized programs. However, the funding sources have a reversionary interest in the capital assets proceeds on subsequent disposition. The capital assets purchased with grant award funds are capitalized in the grant-funded fixed asset fund. The assets are depreciated on a straight-line basis over their economic useful lives.

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MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 107

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Capital Assets (Continued)

Capitalization thresholds (the dollar value above which asset acquisitions are added to capital asset accounts), depreciation methods, and estimated useful lives of capital assets reported in SDC's financial statements are as follows:

	Capitalization Threshold	Depreciation Method	Estimated Lives
Buildings	\$5,000	Straight-line	30-35 yrs
Leasehold improvements	5,000	Straight-line	7-10 yrs
Furniture and equipment	5,000	Straight-line	5-10 yrs

Compensated Absences

Vacation is earned at defined hours per pay period for the various employee levels. Employees are allowed to carryover to the following year one-half of the vacation earned in a year. Employees who terminate or retire are paid for accumulated vacation earned but not taken. SDC records vacation pay when earned.

Employees may accumulate unused sick pay to a maximum of 90 days. However, accumulated unused sick pay does not vest; therefore, upon termination or retirement, accumulated sick leave is forfeited. SDC records sick pay when the employees use this benefit.

Payments for vacation and sick leave will be made at rates in effect when the benefits are used. Accumulated vacation liability at December 31, 2013 is determined on the basis of current wage rates.

Long-Term Obligations

All long-term obligations to be repaid from governmental and business-type resources are reported as liabilities in the government-wide financial statements. The long-term obligations consist entirely of notes payable.

Long-term obligations for governmental funds are not reported as liabilities in the fund financial statements. The face value of debts (plus any premiums) are reported as other financial sources and payments of principal and interest are reported as expenditures. The accounting in proprietary funds in the same as it is in the government-wide statements.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Equity Classifications

Government-Wide Statements

Equity is classified as net position and displayed in three components:

- a. Net investment in capital assets – Consists of capital assets including restricted capital assets, net of accumulated depreciation and reduced by the outstanding balances (excluding unspent debt proceeds) of any bonds, mortgages, notes, or other borrowings that are attributable to the acquisition, construction, or improvement of those assets.
- b. Restricted net position – Consists of net position with constraints placed on their use either by 1) external groups such as creditors, grantors, contributors, or laws or regulations of other governments or, 2) law through constitutional provisions or enabling legislation.
- c. Unrestricted net position – All other net positions that do not meet the definition of “restricted” or “net investment in capital assets.”

When both restricted and unrestricted resources are available for use, it is SDC's policy to use restricted resources first, and then unrestricted resources as they are needed.

Fund Statements

Governmental fund equity is classified as fund balance and displayed as follows:

- a. Nonspendable - Includes fund balance amounts that cannot be spent either because they are not in spendable form or because legal or contractual requirements require them to be maintained intact.
- b. Restricted - Consists of fund balances with constraints placed on their use either by 1) external groups such as creditors, grantors, contributors, or laws or regulations of other governments or 2) law through constitutional provisions or enabling legislation.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 Summary of Significant Accounting Policies (Continued)

Equity Classifications (Continued)

Fund Statements (Continued)

- c. Committed - Includes fund balance amounts that are constrained for specific purposes that are internally imposed by the government through formal action of the highest level of decision making authority. Fund balance amounts are committed through a formal action (resolution or motion) of SDC. This formal action must occur prior to the end of the reporting period, but the amount of the commitment, which will be subject to the constraints, may be determined in the subsequent period. Any changes to the constraints imposed require the same formal action of SDC that originally created the commitment.
- d. Assigned - Includes spendable fund balance amounts that are intended to be used for specific purposes that are not considered restricted or committed. Fund balance may be assigned through the following; 1) All remaining positive spendable amounts in governmental funds, other than the general fund, that are neither restricted nor committed. Assignments may take place after the end of the reporting period.
- e. Unassigned - Includes residual positive fund balance within the general fund which has not been classified within the other above mentioned categories. Unassigned fund balance may also include negative balances for any governmental fund if expenditures exceed amounts restricted, committed, or assigned for those purposes.

SDC considers restricted amounts to be spent first when both restricted and unrestricted fund balance is available unless there are legal documents / contracts that prohibit doing this, such as in grant agreements requiring dollar for dollar spending. Additionally, SDC would first use committed, then assigned and lastly unassigned amounts of unrestricted fund balance when expenditures are made.

Proprietary fund equity is classified the same as in the government-wide statements.

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MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 110

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 1 **Summary of Significant Accounting Policies (Continued)**

Federal, State, and Local Agency Grant Funds

Program funds authorized under federal, state, and local agency grants, with the exception of the Child and Adult Care Food (CACF) program, are requisitioned from such agencies primarily for reimbursement of allowable costs incurred up to amounts contracted for under each grant. These funds are accounted for at the time allowable costs are incurred. The grant periods to individual grants do not necessarily coincide with the fiscal year of SDC. Since SDC receives funds either on an advance basis or on a cost-reimbursement basis, either a receivable (due from grantor agencies) or a liability (deferred revenue) may exist at SDC's balance sheet date.

CACF is funded through the State of Wisconsin, Department of Public Instruction and reimburses SDC on a predetermined rate for each eligible meal served. Revenue is recognized in the period the meals are served. Any excess revenue not expended at the end of the grant award period is recorded as a special revenue fund balance and is available for use in the future program.

Expenditures

SDC accounts for operating expenditures by program activity and cost category. Indirect costs are allocated to programs, as permitted, based on indirect cost rate detailed in an indirect cost plan.

Budgets and Budgetary Accounting

Budgets are established as part of the grant application process and are approved by the respective grantor agencies. A formal consolidated budget is prepared and reviewed by SDC based on anticipated funding levels. An actual to budget comparison for the Special Revenue Fund is included in the financial statements. No budget is adopted for the General Fund.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 2 Cash and Investments

SDC's cash and investments at year end were comprised of the following:

	<u>Bank Balance</u>	<u>Carrying Value</u>	<u>Associated Risks</u>
Cash deposits	\$ 1,434,839	\$ 1,383,711	Custodial credit risk
LGIP	6,498	6,498	Credit risk
	<u>\$ 1,441,337</u>	<u>\$ 1,390,209</u>	

Reconciliation to financial statements

Per statement of net position

Primary Government:

Cash	\$ 454,806
Restricted cash	926,974

Component Unit:

Cash	8,429
Total Cash and Investments	<u>\$ 1,390,209</u>

Deposits in each local and area bank are insured by the FDIC in the amount of \$250,000 for time and savings accounts (including NOW accounts) and \$250,000 for demand deposit accounts (interest-bearing and noninterest-bearing). In addition, if deposits are held in an institution outside of the state in which the government is located, insured amounts are further limited to a total of \$250,000 for the combined amount of all deposit accounts.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 2 **Cash and Investments (Continued)**

Custodial Credit Risk

Deposits

Custodial credit risk is the risk that in the event of a bank failure, SDC's deposits may not be returned to SDC. SDC's deposit policy is that cash is deposited in banks with FDIC coverage and bank balances in excess of FDIC coverage are collateralized with securities held by the pledging financial institution in SDC's name.

As of December 31, 2013, \$250,000 of SDC's bank balance of \$1,210,125 was insured and another \$165,350 was collateralized by securities held by the pledging financial institution and \$794,775 was uninsured.

As of December 31, 2013, SDC also had \$224,714 of funds on deposit with a credit union for the Ways to Work program which was entirely insured.

Credit Risk

Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations.

SDC had invested \$6,498 as of December 31, 2013 in the external Wisconsin Local Government Investment Pool which is not rated.

See Note 1 for further information on deposit and investment policies.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 3 Capital Assets

Buildings and equipment of the proprietary funds at December 31, 2013, consisted of the following:

Internal Service Funds	Beginning Balance	Additions	Deletions	Ending Balance
Capital assets not depreciated:				
Land	\$ 84,550	\$ -	\$ -	\$ 84,550
Capital assets depreciated:				
Buildings	451,680	-	-	451,680
Leasehold improvements	817,970	-	(320,395)	497,575
Furniture and equipment	1,047,388	14,808	(18,000)	1,044,196
Total depreciated assets	2,317,038	14,808	(338,395)	1,993,451
Less accumulated depreciation:				
Buildings	148,622	41,124	-	189,746
Leasehold improvements	773,628	5,543	(320,395)	458,776
Furniture and equipment	856,472	110,800	(18,000)	949,272
Total accumulated depreciation	1,778,722	157,467	(338,395)	1,597,794
Internal service fund capital assets (net)	\$622,866	\$ (142,659)	\$ -	\$ 480,207

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Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 3 Capital Assets (Continued)

<u>Governmental Activities</u>	<u>Beginning Balance</u>	<u>Additions</u>	<u>Deletions</u>	<u>Ending Balance</u>
Capital assets not depreciated:				
Land	\$ 84,550	\$ -	\$ -	\$ 84,550
Capital assets depreciated:				
Buildings	451,680	-	-	451,680
Leasehold improvements	817,970	-	(320,395)	497,575
Furniture and equipment	2,860,880	18,195	(796,383)	2,082,692
Total depreciated assets	4,130,530	18,195	(1,116,778)	3,031,947
Less accumulated depreciation:				
Buildings	148,622	41,124	-	189,746
Leasehold improvements	773,629	5,543	(320,395)	458,777
Furniture and equipment	2,481,274	194,989	(727,365)	1,948,898
Total accumulated depreciation	3,403,525	241,656	(1,047,760)	2,597,421
Total governmental activities capital assets (net)	\$811,555	\$ (223,461)	\$ (69,018)	\$ 519,076

Depreciation expense for the year ended December 31, 2013, was charged to governmental functions as follows.

Governmental activities:	
Internal service fund depreciation	\$ 149,820
Depreciation not charged to a specific function	91,836
Total depreciation for governmental activities	\$ 241,656

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 4 Operating Leases

Rent expense for facilities for 2013 totaled \$1,115,250. The future minimum payments under operating leases with initial or remaining terms of more than one year are as follows:

2014	\$ 438,692
2015	36,558
<u>Total</u>	<u>\$ 475,250</u>

Note 5 Restricted Cash

In 2005, SDC received a Weatherization grant from the Wisconsin Department of Administration (DOA). Included in the Weatherization grant is a stipulation that SDC maintain a separate and distinct bank account that reflects the receipt and expenditure of all funds related to the Weatherization program. The cash balance in this restricted account was \$702,260 as of December 31, 2013. An additional \$224,714 of cash is also restricted for other grant programs. See Note 2 regarding cash.

Note 6 Employee Benefits

SDC has a defined contribution pension plan, which is available to all employees of SDC who are 18 years of age or older and have completed 1,000 hours of service during a calendar year. The plan is a voluntary money purchase plan to which SDC contributes an amount equal to 7% of the annual compensation paid to eligible employees who enroll in the plan. SDC's contributions to the plan in 2013; 2012; and 2011 were \$568,748; \$1,064,608; and \$1,137,108 respectively.

SDC also has a deferred compensation plan that is available to all employees of SDC. The plan is a voluntary contribution plan, which was formed under Section 457 of the Internal Revenue Code. The SDC adopted GASB Statement No. 32, *Accounting and Financial Reporting for Internal Revenue Code Section 457 Deferred Compensation Plans, a rescission of GASB Statement No. 2 and an amendment of GASB Statement No. 31*. GASB 32 specifies that the plan assets are to be held in trust for the exclusive benefit of participating employees and are not available to creditors. The tax-sheltered annuities purchased under the plan are insured by the Insurance Commissions Fund for the State of Wisconsin. The assets are the property of the employees who have made the contributions into the plan and, therefore, are not included in these financial statements.

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 7 Unearned/Unavailable Revenues

Governmental funds report unearned revenue in connection with receivables for revenues that are not considered to be available to liquidate liabilities of the current period. Governmental funds also defer revenue recognition in connection with resources that have been received, but not yet earned. At the end of the current fiscal year, the various components of unavailable revenue and unearned revenue reported in the governmental funds were as follows:

Grant drawdowns prior to meeting all eligibility requirements	\$ 561,510
Over-allocation of indirect expenses to programs/activities (see Note 8)	278,999
Other	29,057
<u>Total Unearned Revenue for Governmental Activities, December 31, 2013</u>	<u>\$ 869,566</u>

Note 8 Indirect Costs

To facilitate equitable distribution of common purpose costs benefiting more than one direct cost allocation objective, SDC has negotiated an agency-wide indirect costs allocation plan with its cognizant agency, U.S. Department of Health and Human Services (DHHS).

Rates are based upon a percentage of total allowable direct costs. For 2013, a fixed indirect cost rate of 12.5% was set based upon annual projected costs.

The indirect cost allocation plan provides for the carryover of excess revenue or expenditures. The following recaps the activity of the indirect cost pool for 2013:

Unearned revenue, December 31, 2012	\$ 517,069
Indirect charges to programs/activities	3,341,312
<u>Indirect expenses</u>	<u>(3,579,382)</u>
<u>Unearned revenue, December 31, 2013</u>	<u>\$ 278,999</u>

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 9 Related Parties

As required by Wisconsin Statutes, SDC has representatives from several grantor agencies on the Board of Commissioners. Cash received from related parties for the year ended December 31, 2013, and due from grantor agencies at December 31, 2013, is summarized as follows:

	Cash Received	Due From Grantor Agencies
Milwaukee County	\$ 1,504,000	\$ 550,016
City of Milwaukee	476,144	241,469
Milwaukee Area Technical College	13,060	3,063
Totals	\$ 1,993,204	\$ 794,548

Note 10 Delegate Expenses

SDC delegates a portion of several of their programs to delegate agencies. Delegate expenses are included on the statement of revenue, expenditures, and changes in fund balance in the contractual expense category in the special revenue fund. Delegate expenses reported for the year ended December 31, 2013, are as follows:

Program	Amount
Federal Head Start	\$ 5,193,645
State Head Start	331,450
Youth Diversion Project (YDP)	29,605
Total	\$ 5,554,700

Note 11 Notes Payable

Notes payable consist of the following:

Fixed interest rate 4.5% note payable to Wells Fargo with an original balance of \$274,514. Requires monthly payments of \$3,108. The balance of the note payable is due on February 25, 2018. The note is collateralized by real estate.	\$ 254,931
Notes payable	\$ 254,931

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Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 11 **Notes Payable (Continued)**

The notes payable activity during 2013 was as follows:

Gov't Activities	Beginning Balance	Additions	Reductions	Ending Balance	Due Within One Year
Notes payable:					
Wells Fargo	\$ 274,514	\$ -	\$ 19,582	\$ 254,931	\$ 26,264

Future debt maturities are as follows:

	Principal	Interest	Total
2014	\$ 26,264	\$ 11,026	\$ 37,290
2015	27,488	9,802	37,290
2016	28,743	8,547	37,290
2017	30,108	7,182	37,290
2018	142,328	1,559	143,887
Totals	\$ 254,931	\$ 38,116	\$ 293,047

Interest expense for the year ended December 31, 2013, was \$12,695.

Note 12 **Line of Credit**

SDC has a \$525,000 line of credit with a bank. The line expires on March 8, 2014, and has an interest rate equal to the bank index rate with a minimum rate of 5%.

The line of credit activity during 2013 was as follows:

	Beginning Balance	Additions	Reductions	Ending Balance
Line of credit	\$ -	\$ 655,000	\$ 230,000	\$ 425,000

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 13 Interfund Receivables and Payable

The composition of the interfund balances at December 31, 2013, is as follows:

Receivable Fund	Payable Fund	Amount	Amount
General	Special revenue	\$ 1,250,464	\$ 1,250,464
Special revenue	Special revenue	795,254	795,254
Internal service	Internal service	397,805	259,620
	Special revenue		138,185
Enterprise	Internal service	124,278	124,278
Totals		\$ 2,567,801	\$ 2,567,801
		Receivable Amount	Payable Amount
Recap:			
General		\$ 1,250,464	\$ -
Special revenue		795,254	2,183,903
Enterprise		124,278	
Internal service		397,805	383,898
Totals		\$ 2,567,801	\$ 2,567,801

The interfund balances resulted from the time lag between the dates that (1) interfund goods and services are provided or reimbursable expenditures occur, (2) transactions are recorded in the accounting system, and (3) payments between funds are made. All amounts are due within one year.

For the statement of net position, interfund balances which are owed within the governmental activities or business-type activities are netted and eliminated.

Note 14 Economic Dependency

SDC is economically dependent on annual contributions and grants from federal, state and local governments as it receives 99% of its revenues for governmental activities from these sources.

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Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 15 Risk Management

SDC is exposed to various risks of loss related to torts; theft of, damage to, or destruction of assets; errors and omissions; workers compensation; and health care of its employees. All of these risks are covered through the purchase of commercial insurance, with minimal deductibles. Settled claims have not exceeded the commercial coverage in any of the past three years. There were no significant reductions in coverage compared to the prior year.

Note 16 Commitments and Contingencies

Claims and judgments are recorded as liabilities if all the conditions of Governmental Accounting Standards Board pronouncements are met. The liability and expenditure for claims and judgments are only reported in governmental funds if it has matured. Claims and judgments are recorded in the government-wide statements and proprietary funds as expenses when the related liabilities are incurred.

From time to time, SDC is party to various pending claims and legal proceedings. Although the outcome of such matters cannot be forecasted with certainty, it is the opinion of management and legal counsel that the likelihood is remote that any such claims or proceedings will have a material adverse effect on SDC's financial position or results of operations.

SDC receives federal and state grants for specific purposes that are subject to review and audit by the grantor agencies. Such audits could lead to requests for reimbursements to the grantor agency for expenditures disallowed under terms of the grants. Management believes such disallowances, if any, would be immaterial.

Note 17 Beneficial Interest – Greater Milwaukee Foundation

GAAP requires that if a community foundation accepts a contribution from an agency and agrees to transfer those assets, the return on investment of those assets, or both back to the agency, then these contributions are presented as a liability (instead of as a net asset) on the financial statements of the community foundation and as an asset on the financial statements of the donor. As a result, assets transferred by SDC Foundation to the Greater Milwaukee Foundation, a community foundation, for which SDC Foundation, as donor, is the beneficiary of the transferred assets, have been reflected on SDC Foundation's Statement of Net Position as an asset entitled Beneficial interest - Greater Milwaukee Foundation.

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MSD 001 Wisconsin Home Energy Assistance Program (WHEAP)- Social Development Commission Page 121

Community Relations - Social Development Commission in Milwaukee County

Notes to Financial Statements
As of and for the Year Ended December 31, 2013

Note 18 **Effect of New Accounting Standards on Current-Period Financial Statements**

The Governmental Accounting Standards Board (GASB) has approved the following:

- Statement No. 67, Financial Reporting for Pension Plans - an amendment of GASB Statement No. 25
- Statement No. 68, Accounting and Financial Reporting for Pensions - an amendment of GASB Statement No. 27
- Statement No. 69, Government Combinations and Disposals of Government Operations
- Statement No. 70, Accounting and Financial Reporting for Nonexchange Financial Guarantees

When they become effective, application of these standards may restate portions of these financial statements.

Supplementary Information

Community Relations - Social Development Commission
Milwaukee County

Exhibit XI

Schedule of Departmental Assets, Liabilities, and Fund Equity by Individual Fund
of December 31, 2013

	SPECIAL REVENUE FUND							State Head Start
	TOTAL (MEMO ONLY) ALL FUNDS	General Fund	Foundation	Federal Head Start and Comm. Prevention	HUD Supportive Housing	Senior Companion	Various Grants from the City of Milwaukee	
ASSETS								
Cash	\$ 433,235	\$ 454,806	\$ 8,429					\$ -
Invested cash	926,974	-	-	-	-	-	-	-
Accounts receivable	1,618,913	-	-	-	-	-	-	-
Due from grant agencies	593,856	29,613	53,965	-	238,725	18,756	241,469	549,960
Due from other funds	2,557,801	1,250,464	-	-	-	-	103	80,669
Due from primary government	-	-	-	-	-	-	-	-
Due from money	37,996	-	-	-	-	-	-	-
Due from interest	33,411	20,033	-	-	-	647	-	645
Due from other funds	117,540	-	117,540	-	-	-	-	-
Due from subgrantees	-	-	-	-	-	-	-	-
Due from interest - Greater Milwaukee Foundation	-	-	-	-	-	-	-	-
Due from Current Assets	6,379,236	1,754,916	179,924	-	238,725	19,403	241,572	631,274
Due from	34,550	-	-	-	-	-	-	-
Buildings and equipment	3,031,947	-	-	-	-	-	-	-
Accumulated depreciation	(2,597,421)	-	-	-	-	-	-	-
Due from Social New-Career Assets	519,876	-	-	-	-	-	-	-
TOTAL ASSETS	\$ 6,898,812	\$ 1,754,916	\$ 179,924	\$ -	\$ 238,725	\$ 19,403	\$ 241,572	\$ 631,274
LIABILITIES								
Accounts payable	\$ 804,568	\$ 39,162	\$ 150	\$ -	\$ 132,148	\$ 8,128	\$ 109,827	\$ 6,743
Other liabilities	406,489	295,272	416	-	1,982	2,445	1,689	34,438
Unearned revenue	875,900	278,999	1,560	-	-	8,830	-	-
Due to other funds	2,557,801	-	-	-	104,815	-	120,973	605,814
Due to component unit	-	-	-	-	-	-	-	-
Due from credit	679,971	425,000	-	-	-	-	-	-
Due from other funds	5,354,689	1,838,433	2,126	-	238,945	19,403	241,469	646,995
TOTAL LIABILITIES	\$ 10,689,718	\$ 2,937,864	\$ 2,731	\$ -	\$ 282,085	\$ 37,766	\$ 273,878	\$ 713,992
FUND EQUITY (DEFICIT)								
Investment in capital assets	264,145	-	-	-	-	-	-	-
Reserve	63,839	20,033	-	-	-	647	-	645
Unexpended	471,508	-	-	-	-	-	-	-
Unassigned	816,232	696,450	177,828	-	(220)	(647)	103	(16,366)
Restricted	(71,601)	-	-	-	(220)	-	-	-
TOTAL FUND EQUITY (DEFICIT)	1,544,123	716,483	177,828	-	(220)	-	103	(15,721)
TOTAL LIABILITIES AND FUND EQUITY	\$ 6,898,812	\$ 1,754,916	\$ 179,924	\$ -	\$ 238,725	\$ 19,403	\$ 241,572	\$ 631,274

MSD 001 Wisconsin Home Energy Assistance Program (WHEAP) - Social Development Commission Page 124

**Community Relations - Social Development Commission
Milwaukee County**

Exhibit XI (Continued)
Schedule of Departmental Assets, Liabilities, and Fund Equity by Individual Fund
of December 31, 2013

	SPECIAL REVENUE FUND				ENTERPRISE			INTERNAL SERVICE FUND		
	State Food Program	State DHS CSBG and Wx Programs	Misc. Grants	Total Special Revenue	Grant Funded Capital Assets	Food Service	Other Services	SD Properties, Inc.	Internal Service	Total
ASSETS										
Restricted cash		702,260	224,714	926,974						
Due from grantor agencies	309,028	716,876	63,049	1,638,913						
Other accounts receivable	2,834	-	483,028	483,028		672	25,027	1,561		26,588
Due from other funds	543,175	68,538	83,993	795,254		124,278	370,281	27,524		397,805
Due from primary government										
Inventory	17,479	18,056	401	35,535			2,461			2,461
Prepaid expenses		6,578		8,271			4,869			5,107
Prepaid interest - Greater Milwaukee Foundation										
Due from subgrantees										
Total Current Assets	872,516	1,512,328	372,157	3,887,975		124,950	482,638	29,333		431,961
Buildings and equipment					1,038,495		1,241,287			84,550
Accumulated depreciation					(999,626)		(1,155,982)			(752,165)
Total Non-Current Assets					38,869		85,305			394,902
TOTAL ASSETS	872,516	1,512,328	372,157	3,887,975	38,869	124,950	482,638	424,225		912,168
LIABILITIES										
Accounts payable		274,260	54,253	588,359				167,653		179,897
Accrued liabilities		48,258	11,123	99,915				30,886		30,886
Unearned revenue		325,814	25,866	561,510		4,774				29,057
Due to other funds	464,300	680,258	198,743	2,183,903				156,061		383,898
Due to component unit										
Accounts payable										
Total Liabilities	464,300	1,528,590	290,085	3,430,687		4,774	455,433	254,931		878,669
FUND EQUITY (DEFICIT)										
Investment in capital assets					38,869					225,276
Retainable	17,479	24,634	401	43,806						
Unassigned	390,737		80,771	471,508						
Designated		(40,896)		(58,026)						
Restricted										
Total Fund Equity (Deficit)	468,216	(16,262)	81,172	457,238	38,869	120,176	(52,795)	(138,982)		(191,777)
TOTAL LIABILITIES, DEFERRED INLOWS OF RESOURCES AND FUND EQUITY	872,516	1,512,328	372,157	3,887,975	38,869	124,950	482,638	424,225		912,168

Community Relations - Social Development Commission
Milwaukee County

Exhibit XII

Schedule of Departmental Revenue, Expenditures, and Fund Equity by Individual Fund
For the Year Ended December 31, 2013

MSD 001 Wisconsin Home Energy Assistance Program (WHEAP) - Social Development Commission Page 126

	TOTAL (MEMO ONLY) ALL FUNDS		SPECIAL REVENUE FUND					State Head Start
	General Fund	Foundation	Federal Head Start and Comm. Prevention	HUD Supportive Housing	Senior Compensation	Various Grants from the City of Milwaukee	LIFEAP and Other County Programs	
REVENUE								
Churn revenue	\$ 29,837,387	\$ 161,839	\$ 11,631,301	\$ 626,437	\$ 315,651	\$ 454,679	\$ 1,786,447	\$ 740,427
Other	2,248,996	93,796	128,993	34,386	1,000	-	535	-
Foundation transfer	6,590	(158,059)	-	-	-	-	-	-
Revenue	31,286,383	97,577	11,760,294	660,823	316,651	454,679	1,786,982	740,427
EXPENDITURES								
Salaries and wages	7,638,355	5,923	2,791,007	102,406	66,723	66,008	931,990	96,537
Employee benefits	2,738,684	1,922	1,087,626	46,369	13,254	21,557	283,538	45,402
Contractual	11,913,818	21,699	5,391,991	390,299	1,085	334,077	108,397	467,440
Travel	105,831	-	28,100	9,400	1,225	420	-	5,000
Utilities	95,171	81	53,166	3,277	5,181	2,001	4,318	3,500
Supplies	3,307,595	-	718,123	8,694	3,948	6,128	196,888	20,000
Equipment and building depreciation	416,243	-	53,719	18,249	-	-	1,064	-
Equipment maintenance and depreciation	605,780	2,125	95,073	5,704	438	8,893	19,427	12,250
Leasable supplies	1,596,930	-	109,831	-	208,342	-	(69)	4,578
Participant assistance	649,591	30,981	144,598	-	5,310	1,997	51,436	3,452
Program support	-	-	-	6,572	-	(42,910)	-	-
Direct costs	3,341,312	2,840	1,307,169	73,824	12,145	58,288	109,599	82,268
Expenses	32,403,319	85,696	11,766,494	681,035	316,651	454,469	1,796,588	740,427
Balance (Deficit) of Revenue	(822,937)	(75,217)	(140)	(212)	-	210	(9,406)	-
Other Expenditures	2,057,050	150,804	140	(8)	-	(107)	(6,315)	-
Balance (Deficit) of Equity	\$ 1,544,123	\$ 716,483	\$ 177,808	\$ (220)	\$ -	\$ 183	\$ (15,721)	\$ -

Community Relations - Social Development Commission
Milwaukee County

Exhibit XII (Continued)
Schedule of Departmental Revenue, Expenditures, and Fund Equity by Individual Fund
for the Year Ended December 31, 2013

	SPECIAL REVENUE FUND				ENTERPRISE FUND				INTERNAL SERVICE FUND				Total Internal Service
	State Food Program	State DHS Programs	State DHS CBBG and Wx Programs	Misc. Grants	Total Special Revenue Fund	Grant Funded General Capital Assets	Food Service	Other Services	Properties, Inc.	SD	Total Internal Service		
REVENUE													
Operating revenue	\$ 2,752,253	\$ 10,095,463	\$ 1,072,890	\$ 29,475,548	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other revenue	110,507	21,401	49,368	345,190	151,492	151,586	1,387,433	263,070	1,650,203				1,650,203
Contribution transfer		2,000	148,498	151,492									
Revenue	2,862,760	10,118,864	1,221,356	29,972,236	151,492	151,586	1,387,433	263,070	1,650,203				1,650,203
EXPENDITURES													
Salaries and wages	767,677	1,938,870	598,894	7,359,112	41,633	41,633	231,683		231,683				231,683
Travel	293,796	663,466	197,992	2,635,250	13,513	13,513	87,999		87,999				87,999
Telephone benefits	4,801	4,998,588	109,075	11,804,753	223	223	82,100	5,043	87,143				87,143
Contractual		298	47,250	105,831									
Printing		21,203	14,467	94,544			496		496				496
Travel	151,289	894,985	126,329	2,126,284	8,012	8,012	966,980	246,337	1,173,277				1,173,277
Agency and building depreciation	76,739	54,712		204,483	5,046	5,046	53,518	3,378	56,896				56,896
Equipment maintenance and depreciation	142,942	234,993	14,978	536,390	7,133	7,133	38,925	1,297	60,222				60,222
Accountable supplies	1,193,831	(16,009)	36,187	1,538,691	38,239	38,239							
Recipient assistance	54,867	129,290	29,455	426,997	5,591	5,591	60,672	39,654	100,376				100,376
Other		53,329	(6,790)										
Program support	335,717	1,120,165	146,287	3,333,472									
Contract costs	3,838,449	10,132,382	1,283,482	30,165,717	149,870	149,870	1,592,355	295,708	1,798,063				1,798,063
Expenditures	(167,689)	(5,518)	(12,726)	(193,481)	(149,870)	(149,870)	(114,928)	(32,639)	(197,439)				(197,439)
Operating equity (deficit) - December 31, 2012	575,905	(12,744)	95,696	650,169	188,689	188,689	147,430	33,628	181,058				181,058
Operating equity (deficit) - December 31, 2013	\$ 466,216	\$ (16,262)	\$ 81,172	\$ 457,288	\$ 38,869	\$ 38,869	\$ 32,518	\$ 989	\$ 39,858				\$ 39,858

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME
 AGENCY FEDERAL TAX ID NUMBER
 DEHS DIVISION
 NAME OF PROGRAM SITE

Community Relations-Social Development Commission
 39-1234567
 Management Services: Wisconsin Home Energy Assistance Program

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

ADDRESS OF PROGRAM SITE

PROGRAM NAME

Program #

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
 Other Specify

- 1. DHHS Program's Units
- 2. Other Funding Source's Units
- 4. 2014 Budgeted Units
- 5. 2013 Actual Units
- 5 3 Actual Costs

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
4841 N. Starbuck St, Waukegan, IL 60087	4841 N. Starbuck St, Waukegan, IL 60087	4841 N. Starbuck St, Waukegan, IL 60087	3968 S. Chase Avenue	3968 S. Chase Avenue	3968 S. Chase Avenue
Program Name	Program Name	Program Name	Program Name	Program Name	Program Name
Program#1	Program#2	Program#3	Program#4	Program#5	Program#6
5.50	5.50	5.50	5.50	5.50	5.50
8.00	8.00	8.00	8.00	8.00	8.00
25,000.00	18,000.00	6,000.00	18,000.00	4,500.00	5,000.00
Other Applicants	Other Applicants	Other Applicants	Other Applicants	Other Applicants	Other Applicants

* THIS SAME FIGURE IS TO BE USED AS THE "TOTAL" ON THE CLIENT CHARACTERISTICS CHART

DATE (INITIAL) : [REDACTED] DATE (FINAL): [REDACTED]

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

Program funded by Site must include separate form for each Site

AGENCY NAME Community Relations-Social Development Commission
 NAME & ADDRESS OF PROGRAM SITE Zone 1
4041 N. Richards St./6948 N. Teutonia
 AGENCY FEDERAL TAX ID NUMBER 39-1234567
 DHHS DIVISION Management Services: Wisconsin Home Energy Assistance Program
 PROGRAM NAME Energy Assistance
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. Programs

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 Other Applicants

ALL Proposers must provide the UNITS details even if their Programs are Cost reimbursements 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="0.00"/>	<input type="text" value="\$ 564,036"/>	<input type="text" value="\$"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ 29,712"/>	<input type="text" value="\$"/>
3. Total	<input type="text" value="0.00"/>	<input type="text" value="\$ 593,748"/>	<input type="text" value="\$"/>
4. 2014 Budgeted Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$"/>	<input type="text" value="\$"/>
5. 2015 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): _____ DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Relations-Social Development Commisison**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Energy Assistance	1	A	0
Energy Assistance	1	B	0.175
Energy Assistance	1	H	0
Energy Assistance	1	I	0
Energy Assistance	1	W	0
Energy Assistance	2	A	0
Energy Assistance	2	B	0
Energy Assistance	2	H	0
Energy Assistance	2	I	0
Energy Assistance	2	W	0
Energy Assistance	3	A	0
Energy Assistance	3	B	6.3
Energy Assistance	3	H	1.05
Energy Assistance	3	I	0
Energy Assistance	3	W	0
Energy Assistance	4	A	0
Energy Assistance	4	B	0
Energy Assistance	4	H	0
Energy Assistance	4	I	0
Energy Assistance	4	W	0
Energy Assistance	5	A	0
Energy Assistance	5	B	0
Energy Assistance	5	H	0
Energy Assistance	5	I	0
Energy Assistance	5	W	0
Energy Assistance	6	A	0
Energy Assistance	6	B	0
Energy Assistance	6	H	0
Energy Assistance	6	I	0
Energy Assistance	6	W	0
Energy Assistance	7	A	0
Energy Assistance	7	B	0
Energy Assistance	7	H	0
Energy Assistance	7	I	0
Energy Assistance	7	W	0
Energy Assistance	8	A	0
Energy Assistance	8	B	0
Energy Assistance	8	H	0
Energy Assistance	8	I	0
Energy Assistance	8	W	0
Energy Assistance			0

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

% of Handicapped employees **0.00%**

A	B	H	I	W
0.00%	88.05%	13.95%	0.00%	0.00%

Ethnicity % to total FTE
Rev. 6/14

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Relations-Social Development Commisison**
 Facility/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Energy Assistance** 2015 Prgm No. **Program#1**
 Facility Name **Zone 1**
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		357,856
7100	Employee Health & Retirement Benefits		55,580
7200	Payroll Taxes		66,744
8000	Professional Fees		6,500
8100	Supplies		13,000
8200	Telephone		5,500
8300	Postage and Shipping		6,900
8400	Occupancy		15,000
8500	Rental, Maintenance & Depreciation of Equipment		3,500
8600	Printing and Publications		500
8700	Travel		
8800	Conferences, Conventions, Meetings		
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		1,000
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		61,668
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$	\$ 593,748
0.00%	PROFIT FACTOR		
	TOTAL EXPENSES INCLUDING PROFIT	\$	\$ 593,748
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		29,712
	TOTAL DHHS REQUEST	\$	\$ 564,036

Rev. 6/14

Date (Initial):
 Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commision**
 Disability/Target Program **Management Services: Wisconsin Home Energy Assistance Program**
 Program **Energy Assistance** 2015 Prgm No. **Program#1**
 Facility Name **Zone 1**
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	14,169
	7002	Professional Salaries	\$0.00	9,750
	7003	Clerical Staff Salaries	\$0.00	333,937
	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*			\$	\$ 357,856
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$2,530.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$28,000.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$25,049.95
	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*			\$	\$ 55,580
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$27,276.03
	7202	Unemployment Insurance	\$0.00	\$35,069.93
	7203	Workmen's Compensation Insurance	\$0.00	\$2,182.92
	7204	Disability Insurance Premiums	\$0.00	\$2,185.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 66,744
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	\$200.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$300.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$5,000.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 6,500

* 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 Relations-Social Development Commission		2015 Prgm No.	Program#1
Control Acct. No.	Sub-Account Number	(A)	(B)	(C)	
		Account Description	2012 Gross Budget	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	\$3,500.00	
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$6,500.00	
	8108	New Goods Purchased	\$0.00	\$3,000.00	
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	
	8110	Manufacturing Supplies	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8100 SUB TOTAL *			\$	\$	13,000
8200	8201	Telephone Expense	\$0.00	\$5,500.00	
	8202	Telegraph Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8200 SUB TOTAL *			\$	\$	5,500
8300	8301	Postage and Parcel Post	\$0.00	\$1,400.00	
	8302	Freight	\$0.00	\$0.00	
	8303	Messenger & Delivery Service	\$0.00	\$5,500.00	
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$	6,900
8400	8401	Office Rent	\$0.00	\$15,000.00	
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$0.00	
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00	
	8404	Mortgage Interest	\$0.00	\$0.00	
	8405	Electricity	\$0.00	\$0.00	
	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	\$0.00	
	8410	Real Estate Taxes	\$0.00	\$0.00	
	8411	Personal Property Taxes	\$0.00	\$0.00	
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00	
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	
	8416	Depreciation - Buildings	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8400 SUB TOTAL *			\$	\$	15,000
8500	8501	Equipment rental expenses	\$0.00	\$3,500.00	
	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 *			\$	\$	3,500

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 11
Item # 28 Form 3SE1

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Relations-Social Development Commisison	2015 Prgm No.	Program#1
Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
8600	8601	Printing	\$0.00	\$500.00
	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* \$ - \$ 500

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	\$0.00
	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* \$ - \$ -

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	\$0.00

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

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 Relations-Social Development Commission	2015 Prgm No.	Program#1
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	\$0.00
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$	\$
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	\$1,000.00
	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 *			\$	\$ 1,000
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	61,668
	9202	Transportation		
CONTROL ACCOUNT NO. 9200 SUB TOTAL*			\$	\$ 61,668
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
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***			\$	\$ 593,748

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

Rev. 6/14

Date (Initial):

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target Group **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Energy Assistance** 2015 Prgm No. **Program#1**
 County Name **Zone 1**
 Address **4041 N. Richards St./6848 N. Teutonia**

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		29,712
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		\$ -	\$ 29,712
DHHS CONTRACT REQUEST			564,036
TOTAL REVENUE		\$ -	\$ 593,748

Rev. 6/14

Date (Initial): _____

Date (Final): [REDACTED]

Agency Name Community Relations-Social Development Commission
 Facility/Target Group Management Services: Wisconsin Home Energy Assistance Program
 Program Energy Assistance 2015 Prgm No. Program#1
 Facility Name Zone 1
 Address 4041 N. Richards St./6848 N. Teutonia

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		29,712
CONTROL ACCOUNT NO. 4300 SUB TOTAL*				29,712
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 Relations-Social Development Commission

2015 Prgrn No.

Program#1

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 Relations-Social Development Commission		2015 Prgm No.	Program#1
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**				29,712

*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): _____
Date (Final): _____

Rev. 6/14

FORM 5 TOTAL AGENCY ANTICIPATED EXPENSES

AGENCY: N Child Support Services - Social Development Commission

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	(E) Program Year (Program) Gross Budget	(F) Program Year (Program) Gross Budget	(G) Program Year (Program) Gross Budget	(H) Program Year (Program) Gross Budget	(I) Program Year (Program) Gross Budget	(J) Program Year (Program) Gross Budget	(K) Indirect Costs Gross Budget*	(L) Other Contract Programs & Functions**
6000	Salaries	5,119,547	5,277,856	5,251,371	5,277,856	5,277,856	5,277,856	5,277,856	5,277,856	5,277,856	0	0
6010	Employee Health & Retirement Benefits	2,275,538	2,349,094	2,290,438	2,349,094	2,349,094	2,349,094	2,349,094	2,349,094	2,349,094	0	0
6200	Payroll Taxes	625,485	631,485	608,377	631,485	631,485	631,485	631,485	631,485	631,485	0	0
7000	Professional Fees	844,376	1,157,965	632,420	1,157,965	1,157,965	1,157,965	1,157,965	1,157,965	1,157,965	0	0
8000	Supplies	113,474	78,278	1,050,094	1,100,000	1,100,000	1,100,000	1,100,000	1,100,000	1,100,000	0	0
9200	Telephone	245,442	107,594	114,541	107,594	107,594	107,594	107,594	107,594	107,594	0	0
9300	Postage and Shipping	85,243	87,721	55,471	87,721	87,721	87,721	87,721	87,721	87,721	0	0
9400	Occupancy	2,413,076	3,138,577	1,001,701	3,138,577	3,138,577	3,138,577	3,138,577	3,138,577	3,138,577	0	0
9500	Residual, Maintenance & Depreciation of Equipment	515,014	1,067,774	335,431	1,067,774	1,067,774	1,067,774	1,067,774	1,067,774	1,067,774	0	0
9600	Printing and Publications	92,228	90,235	132,907	90,235	90,235	90,235	90,235	90,235	90,235	0	0
9700	Travel	100,745	82,023	80,465	82,023	82,023	82,023	82,023	82,023	82,023	0	0
9800	Conferences, Conventions, Meetings	58,264	71,191	49,511	71,191	71,191	71,191	71,191	71,191	71,191	0	0
9900	Specific Assistance to Individuals	2,157,214	2,157,214	2,157,214	2,157,214	2,157,214	2,157,214	2,157,214	2,157,214	2,157,214	0	0
0000	Membership Dues	15,462	76,900	85,476	76,900	76,900	76,900	76,900	76,900	76,900	0	0
0100	Awards and Grants	0	0	0	0	0	0	0	0	0	0	0
0200	Travel (if applicable)*	0	0	0	0	0	0	0	0	0	0	0
0300	Client Transportation	84,516	84,516	84,516	84,516	84,516	84,516	84,516	84,516	84,516	0	0
0400	Miscellaneous	2,211,897	2,211,897	2,211,897	2,211,897	2,211,897	2,211,897	2,211,897	2,211,897	2,211,897	0	0
0500	Depreciation of Assets (function)	133,444	60,943	60,943	60,943	60,943	60,943	60,943	60,943	60,943	0	0
0600	Organizations	5,565,472	5,565,472	5,565,472	5,565,472	5,565,472	5,565,472	5,565,472	5,565,472	5,565,472	0	0
TOTAL EXPENSES		35,000,258	33,252,325	32,421,107	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	0	0
PROFIT FACTOR												
TOTAL EXPENSES INCLUDING PROFIT		35,000,258	33,252,325	32,421,107	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	0	0
TOTAL MONETARY CONTRACTARY BUDGET FY10		35,000,258	33,252,325	32,421,107	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	0	0
TOTAL DEBT REQUEST		35,000,258	33,252,325	32,421,107	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	33,252,325	0	0

Date (Last):
Date (First):

* Contract Account Number 9200, Allocated Costs, column E, should be entered as a negative number. In order for column D to cross-foot to zero.
** Use Other Contracts Programs & Functions, column C for all non-Milwaukee County programs or functions

FORM SA TOTAL AGENCY ANTICIPATED REVENUE

AGENCY NAME: Community Relations/Special Development Commission

(A)	(B)	(C)	(D)	(E1)	(E2)	(E3)	(E4)	(E5)	(E6)	(E7)	(E8)	(E9)	(E10)
Control Acct. No.	2013 Actual	2014 Revenue Budget	2015 Revenue Budget	Existing Activities (Program) Revenue Budget	Programs/Initiatives (Program) Revenue Budget	Other Contract Prog. & Func. Revenue Budget							
2000													
2100													
2200													
2300													
2400													
2500													
2600													
2700													
2800													
2900													
3000													
3100													
3200													
3300													
3400													
3500													
3600													
3700													
3800													
3900													
4000													
4100													
4200													
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6600													
6700													
6800													
6900													
7000													
7100													
7200													
7300													
7400													
7500													
7600													
7700													
7800													
7900													
8000													
8100													
8200													
8300													
8400													
8500													
8600													
8700													
8800													
8900													
9000													
9100													
9200													
9300													
9400													
9500													
9600													
9700													
9800													
9900													
10000													
TOTAL NON-DHHS CONTRACT REVENUE													
DHHS CONTRACT REQUEST													
TOTAL REVENUE													

Date (month): _____ Date (year): _____

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

Form 6 INDIRECT COST ALLOCATION PLAN

Summary Sheet

1 Agency Name: Community Relations-Social Development Commission

2 Disability/Target Group: Wisconsin Home Energy Assistance Program Management Services
(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							\$
7100	Employee Health & Retirement Ben.							\$
7200	Payroll Taxes							\$
8000	Professional Fees							\$
8100	Supplies							\$
8200	Telephone							\$
8300	Postage & Shipping							\$
8400	Occupancy							\$
8500	Rental & Maintenance of Equip.							\$
8600	Printing & Publications							\$
8700	Employee Travel							\$
8800	Conferences, Conventions, Meetings							\$
8900	Specific Assistance to Individuals							\$
9000	Membership Dues							\$
9100	Awards & Grants							\$
9300	Client Transportation							\$
9400	Other Miscellaneous (Specify)							\$
9500	Depreciation or Amortization							\$
9600	Allocations to Agencies							\$
	Interest							\$
	Bad Debt							\$
	TOTAL INDIRECT COSTS *	\$	\$	\$	\$	\$	\$	\$

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 21

* 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):

Date (Final):

Item # 28 Form 6

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

1 Agency Name: Community Relations-Social Development Commission
 2 Disability/Target Group: Management Services: Wisconsin Home Energy Assistance Program
 (Use additional copies of this form as needed.)

A Account Number	B Indirect Cost Account Description	C Allowable Total Direct Salaries Allocation *	(E1) Agency Assistance (program)	(E2) Program Name (program)	(E3) Program Name (program)	(E4) Program Name (program)	(E5) Program Name (program)	(E6) Program Name (program)	L Other Contracts Programs & Functions
7000	Salaries								
7100	Employee Health & Retirement Ben.								
7200	Payroll Taxes								
8000	Professional Fees								
8100	Supplies								
8200	Telephone								
8300	Postage & Shipping								
8400	Occupancy								
8500	Rental & Maintenance of Equip.								
8600	Printing & Publications								
8700	Employee Travel								
8800	Conferences, Conventions, Meetings								
8900	Specific Assistance to Individuals								
9000	Membership Dues								
9100	Awards & Grants								
9300	Client Transportation								
9400	Other Miscellaneous (Specify)								
9500	Depreciation or Amortization								
9600	Allocations to Agencies								
	Interest								
	Bad Debt								
	TOTAL INDIRECT COSTS **	\$ 5,338,192	\$ 537,856	281,797	121,714	82,051	100,617	270,123	4,124,033
	TOTAL DIRECT SALARIES								

* 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): _____ Date (Final): _____
 Item # 28 Form 6

Form 6E DIRECT COST ALLOCATION PLAN
Allocation Basis: Direct FTE

- 1 Agency Name: Community Relations-Social Development Commission
 2 Disability/Target Group: Management Services: Wisconsin Home Energy Assistance Program
 (Use additional copies of this form as needed.)

A. Account Number	B. Indirect Cost Account Description	C. Allowable Total Direct FTE Allocation *	(E1) Energy Assistance (program)	(E2) Program Name (program)	(E3) Program Name (program)	(E4) Program Name (program)	(E5) Program Name (program)	(E6) Program Name (program)	L. Other Contracts Programs & Functions
7000	Salaries								
7100	Employee Health & Retirement Ben.								
7200	Payroll Taxes								
8000	Professional Fees								
8100	Supplies								
8200	Telephone								
8300	Postage & Shipping								
8400	Occupancy								
8500	Rental & Maintenance of Equip.								
8600	Printing & Publications								
8700	Employee Travel								
8800	Conferences, Conventions, Meetings								
8900	Specific Assistance to Individuals								
9000	Membership Dues								
9100	Awards & Grants								
9300	Client Transportation								
9400	Other Miscellaneous (Specify)								
9500	Depreciation or Amortization								
9600	Allocations to Agencies								
	Interest								
	Bad Debt								
	TOTAL INDIRECT COSTS **	\$0							
	TOTAL FTE	3823	1175	913	355	223	270	388	

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

Date (Final):

Item # 28 Form 6

Form 6F DIRECT COST ALLOCATION PLAN

Allocation Basis: Square Footage

Community Relations-Social Development Commission

1. Agency Name:

Management Services: Wisconsin Home Energy Assistance Program

2. Disability/Target Group:

(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 Sq Footage Allocation *	Energy Assistance (program)	Energy Assistance (program)	Program Name (program)	Program Name (program)	Program Name (program)	Program Name (program)	Other Contracts Programs & Functions
7000	Salaries								
7100	Employee Health & Retirement Ben.								
7200	Payroll Taxes								
8000	Professional Fees								
8100	Supplies								
8200	Telephone								
8300	Postage & Shipping								
8400	Occupancy								
8500	Rental & Maintenance of Equip.								
8600	Printing & Publications								
8700	Employee Travel								
8800	Conferences, Conventions, Meetings								
8900	Specific Assistance to Individuals								
9000	Membership Dues								
9100	Awards & Grants								
9300	Client Transportation								
9400	Other Miscellaneous (Specify)								
9500	Depreciation of Amortization								
9600	Allocations to Agencies								
	Interest								
	Bad Debt								
	TOTAL INDIRECT COSTS **	\$0							
	TOTAL SQUARE FOOTAGE								

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

** 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):

Date (Final):

Item # 28 Form 6

Form 6G DIRECT COST ALLOCATION PLAN

Allocation Basis: Direct Cost

1. Agency Name: Community Relations-Social Development Commission

2. Disability/Target Group: Management Services: Wisconsin Home Energy Assistance Program
(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 Direct Cost Allocation *	Energy Assistance (program)	Program Name (program)	Other Contracts Programs & Functions				
7000	Salaries								
7100	Employee Health & Retirement Ben.								
7200	Payroll Taxes								
8000	Professional Fees								
8100	Supplies								
8200	Telephone								
8300	Postage & Shipping								
8400	Occupancy								
8500	Rental & Maintenance of Equip.								
8600	Printing & Publications								
Rev. 3/10	Employee Travel								
8800	Conferences, Conventions, Meetings								
8900	Specific Assistance to Individuals								
9000	Membership Dues								
9100	Awards & Grants								
9300	Client Transportation								
9400	Other Miscellaneous (Specify)								
9500	Depreciation or Amortization								
9600	Allocations to Agencies								
	Interest								
	Bad Debt								
	TOTAL INDIRECT COSTS **	30							
	TOTAL DIRECT COSTS	\$13,602,152	\$32,980	\$71,466	\$94,038	\$40,569	\$59,577	\$76,835	\$13,327,307

* Individual line entries for Total Direct Cost Allocation (column C) come from the Indirect Cost Summary Form 6 (column G).
 ** 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): _____ Date (Final): _____
 Item # 28 Form 6

Form 6H DIRECT COST ALLOCATION PLAN

Allocation Basis: Other Allocation Basis

Community Relations-Social Development Commission

1 Agency Name:

2 Disability/Target Group:

Management Services: Wisconsin Home Energy Assistance Program
(Use additional copies of this form as needed.)

A	B	C	(E1)	(E2)	(E3)	(E4)	(E5)	(E6)	L
Account Number	Indirect Cost Account Description	Total Other Allowable Allocation Basis *	Meta Assistance Program Name (program)	Other Contracts Programs & Functions					
7000	Salaries								
7100	Employee Health & Retirement Ben.								
7200	Payroll Taxes								
8000	Professional Fees								
8100	Supplies								
8200	Telephone								
8300	Postage & Shipping								
8400	Occupancy								
8500	Rental & Maintenance of Equip.								
8600	Printing & Publications								
8700	Employee Travel								
8800	Conferences, Conventions, Meetings								
8900	Specific Assistance to Individuals								
9000	Membership Dues								
9100	Awards & Grants								
9300	Client Transportation								
9400	Other Miscellaneous (Specify)								
9500	Depreciation or Amortization								
9600	Allocations to Agencies								
	Interest								
	Bad Debt								
	TOTAL INDIRECT COSTS *								
	TOTAL ALLOCATION BASIS								

* Individual line entries for Total Other Allocation Basis (column C) come from the Indirect Cost Summary Form 6 (column H).

** 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):

Date (Final):

Item # 28 Form 6

FORM 1 - 2015 PROGRAM VOLUME DATA AND UNIT COST CALCULATION

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

AGENCY NAME Community Relations-Social Development Commission
 NAME & ADDRESS OF PROGRAM SITE Zone 2
4041 N. Richards St, 53348 W, Teutonia
 AGENCY FEDERAL TAX ID NUMBER 39-1254567

DHHS DIVISION Management Services: Wisconsin Home Energy Assistance Program

PROGRAM NAME Program Name
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. Program 2

NUMBER OF DAYS PROGRAM OPERATES PER WEEK 5.50
 NUMBER HOURS PROGRAM OPERATES PER DAY 8.00
 NUMBER OF CASES TO BE SERVED PER YEAR * 18,000.00

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

TYPE OF UNIT Other Applicants
 Other: (Specify)

COST CALCULATIONS:	TOTAL	PROGRAM	COST
	PROGRAM	COST BY	PER
	UNITS	FUNDING	UNIT
	(A)	(B)	(C)
1. DHHS Program's Units and Costs	0.00	\$ 615,772	\$
2. Other Funding Source's Units and Costs	0.00	\$ 22,284	\$
3. Total	0.00	\$ 638,056	\$
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): DATE (FINAL):

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: Community Relations-Social Development Commission

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Program Name	1	A	0
Program Name	1	B	0.175
Program Name	1	H	0
Program Name	1	I	0
Program Name	1	W	0
Program Name	2	A	0.375
Program Name	2	B	1
Program Name	2	H	0
Program Name	2	I	0
Program Name	2	W	0
Program Name	3	A	0.8
Program Name	3	B	4.225
Program Name	3	H	0.25
Program Name	3	I	0
Program Name	3	W	0
Program Name	4	A	0
Program Name	4	B	0
Program Name	4	H	0
Program Name	4	I	0
Program Name	4	W	0
Program Name	5	A	0
Program Name	5	B	0
Program Name	5	H	0
Program Name	5	I	0
Program Name	5	W	0
Program Name	6	A	0
Program Name	6	B	0
Program Name	6	H	0
Program Name	6	I	0
Program Name	6	W	0
Program Name	7	A	0
Program Name	7	B	0
Program Name	7	H	0
Program Name	7	I	0
Program Name	7	W	0
Program Name	8	A	0
Program Name	8	B	0
Program Name	8	H	0
Program Name	8	I	0
Program Name	8	W	0
Program Name	8		0

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

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

Ethnicity % to total FTE
Rev. 6/14

A	B	H	I	W
17.22%	79.12%	3.66%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Relations-Social Development Commission**
 Disability/Target **(Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Program Name** 2015 Prgm No. **Program#2**
 Facility Name **Zone 2**
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		281,797
7100	Employee Health & Retirement Benefits		46,737
7200	Payroll Taxes		52,902
8000	Professional Fees		31,550
8100	Supplies		2,000
8200	Telephone		3,500
8300	Postage and Shipping		1,200
8400	Occupancy		140,000
8500	Rental, Maintenance & Depreciation of Equipment		3,000
8600	Printing and Publications		1,080
8700	Travel		
8800	Conferences, Conventions, Meetings		600
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		500
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		66,270
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$	\$ 638,056
0.00%	PROFIT FACTOR		
	TOTAL EXPENSES INCLUDING PROFIT	\$	\$ 638,056
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		22,284
	TOTAL DHHS REQUEST	\$	\$ 615,772

Rev. 6/14

Date (Initial):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commission**
 District/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Zone 2** 2015 Prgm No. **Program#2**
 Faculty Name
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	14,169
	7002	Professional Salaries	\$0.00	59,184
	7003	Clerical Staff Salaries	\$0.00	208,444
	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*			\$
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$2,014.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$24,000.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$19,735.82
	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*			\$	\$ 46,737
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$21,557.50
	7202	Unemployment Insurance	\$0.00	\$27,616.15
	7203	Workmen's Compensation Insurance	\$0.00	\$1,714.56
	7204	Disability Insurance Premiums	\$0.00	\$3,009.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 53,902
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	\$350.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$200.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$30,000.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 31,550

*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 Relations-Social Development Commission	2015 Prgm No.	Program#2
51 Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			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	\$2,500.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$3,500.00
	8108	New Goods Purchased	\$0.00	\$3,000.00
	8109	Raw Materials (Manufacturing) Purchased	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$	\$ 9,000
8200	8201	Telephone Expense	\$0.00	\$3,500.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$	\$ 3,500
8300	8301	Postage and Parcel Post	\$0.00	\$1,200.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$ 1,200
8400	8401	Office Rent	\$0.00	\$10,000.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$3,000.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00
	8404	Mortgage Interest	\$0.00	\$0.00
	8405	Electricity	\$0.00	\$10,000.00
	8406	Gas	\$0.00	\$17,000.00
	8407	Heating Oil	\$0.00	\$0.00
	8408	Water & Sewer	\$0.00	\$0.00
	8409	Janitorial/Maintenance/Repairs Purchased	\$0.00	\$0.00
	8410	Real Estate Taxes	\$0.00	\$0.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$	\$ 140,000
8500	8501	Equipment rental expenses	\$0.00	\$3,000.00
	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 *			\$	\$ 3,000

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		2015 Prgm No.	Program#2	
Community Relations-Social Development Commisison		(B)	(C)	
Control Acct. No.	Sub-Account Number	Account Description	2014 Gross Budget	2015 Gross Budget
8600	8601	Printing	\$0.00	\$1,000.00
	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* \$ 1,000

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	\$0.00
	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* \$

8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$600.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8800 SUB TOTAL* \$ 600

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*

\$	-	\$
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FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Relations-Social Development Commission			2015 Prgm No.	Program#2
Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$0.00

CONTROL ACCOUNT NO 9000 SUB TOTAL* \$ \$

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	\$500.00
	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 * \$ \$ 500

9200	9201	Administrative Costs (Indirect Costs)	\$0.00	66,270
	9202	Transportation		

CONTROL ACCOUNT NO. 9200 SUB TOTAL* \$ \$ 66,270

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*** \$ \$ 638,056

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

Rev. 6/14

Date (Initial):

Date (Final): [REDACTED]

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 35
Item # 28 Form 3SE2

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commission**
 District/Target Group **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **2015 Prgm No. Program#2**
 Facility Name **Zone 2**
 Address **4041 N. Richards St./6848 N. Teutonia**

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		22,284
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		\$ -	\$ 22,284
DHHS CONTRACT REQUEST			615,772
TOTAL REVENUE		\$ -	\$ 638,056

Rev. 6/14

Date (Initial):

Date (Final):

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 36
 Item # 28 Form 4E2

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Relations Social Development Commission**
 Facility/Target **Management Services; Wisconsin Home Energy Assistance Program**
 Program Name **Program #2** 2015 Prgm No. **Program#2**
 Facility Name **Zone 2**
 Address **4041 N. Richards St./6848 N. Tentonia**

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*				22,284
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 Relations-Social Development Commission

2015 Prgm No. Program# 2

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*				

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

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name Community Relations-Social Development Commission		2015 Prgm No.	Program#2	
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**				22,284

*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):

Date (Final):

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: **Community Relations-Social Development Commisison**

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Program Name	1	A	0
Program Name	1	B	0.175
Program Name	1	H	0
Program Name	1	I	0
Program Name	1	W	0
Program Name	2	A	0
Program Name	2	B	0
Program Name	2	H	0
Program Name	2	I	0
Program Name	2	W	0
Program Name	3	A	0
Program Name	3	B	0.725
Program Name	3	H	0.25
Program Name	3	I	0
Program Name	3	W	0
Program Name	4	A	0
Program Name	4	B	0
Program Name	4	H	0
Program Name	4	I	0
Program Name	4	W	0
Program Name	5	A	0
Program Name	5	B	0
Program Name	5	H	0
Program Name	5	I	0
Program Name	5	W	0
Program Name	6	A	0
Program Name	6	B	0
Program Name	6	H	0
Program Name	6	I	0
Program Name	6	W	0
Program Name	7	A	0
Program Name	7	B	0
Program Name	7	H	0
Program Name	7	I	0
Program Name	7	W	0
Program Name	8	A	0
Program Name	8	B	0
Program Name	8	H	0
Program Name	8	I	0
Program Name	8	W	0
*If full-time equivalents (FTE's) are not based on 40 hours per week, specify:			0

% of Handicaped employees	0.00%
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Ethnicity % to total FTE
Rev. 6/14

A	B	H	I	W
0.00%	78.26%	21.74%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Program#3** 2015 Prgm No. **Program#3**
 Facility Name **Zone 3**
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		121,714
7100	Employee Health & Retirement Benefits		18,893
7200	Payroll Taxes		22,431
8000	Professional Fees		5,250
8100	Supplies		6,000
8200	Telephone		3,500
8300	Postage and Shipping		
8400	Occupancy		15,000
8500	Rental, Maintenance & Depreciation of Equipment		
8600	Printing and Publications		250
8700	Travel		
8800	Conferences, Conventions, Meetings		
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		1,000
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		22,489
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$ -	\$ 216,527
0.00%	PROFIT FACTOR		
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 216,527
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		10,313
	TOTAL DHHS REQUEST	\$ -	\$ 206,214

Rev. 6/14

Date (Initial):
Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commission**
 Disability/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name
 Faculty Name **Zone 3** 2015 Prgm No. **Program#3**
 Address **4041 N. Richards St./6848 N. Teutonia**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	14,169.00
	7002	Professional Salaries	\$0.00	19,500.00
	7003	Clerical Staff Salaries	\$0.00	88,044.00
	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*			\$	\$ 121,714.00
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$973.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$9,400.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$8,518.96
	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*			\$	\$ 18,893.96
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$9,311.10
	7202	Unemployment Insurance	\$0.00	\$11,977.94
	7203	Workmen's Compensation Insurance	\$0.00	\$742.45
	7204	Disability Insurance Premiums	\$0.00	\$50.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 22,431.49
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	\$150.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$400.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$4,000.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 5,250.00

*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		Community Relations-Social Development Commission		2015 Prgm No.	Program#3
		(A)	(B)	(C)	
Control Acct. No.	Sub-Account Number	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	\$1,000.00	
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$2,000.00	
	8108	New Goods Purchased	\$0.00	\$3,000.00	
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00	
	8110	Manufacturing Supplies	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8100 SUB TOTAL *			\$	\$ 6,000	
8200	8201	Telephone Expense	\$0.00	\$3,500.00	
	8202	Telegraph Expense	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8200 SUB TOTAL *			\$	\$ 3,500	
8300	8301	Postage and Parcel Post	\$0.00	\$0.00	
	8302	Freight	\$0.00	\$0.00	
	8303	Messenger & Delivery Service	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$	
8400	8401	Office Rent	\$0.00	\$15,000.00	
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$0.00	
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00	
	8404	Mortgage Interest	\$0.00	\$0.00	
	8405	Electricity	\$0.00	\$0.00	
	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	\$0.00	
	8410	Real Estate Taxes	\$0.00	\$0.00	
	8411	Personal Property Taxes	\$0.00	\$0.00	
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00	
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00	
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00	
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00	
	8416	Depreciation - Buildings	\$0.00	\$0.00	
CONTROL ACCOUNT NO. 8400 SUB TOTAL *			\$	\$ 15,000	
8500	8501	Equipment rental expenses	\$0.00	\$0.00	
	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 *			\$	\$	

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Relations-Social Development Commission		2015 Prgm No.	Program#3
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) (C)		
			2014 Gross Budget	2015 Gross Budget	
8600	8601	Printing	\$0.00	\$250.00	
	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* \$ 250.00

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	\$0.00
	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* \$ 0.00

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	Spnker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8800 SUB TOTAL* \$ 0.00

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* \$ 0.00

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Relations-Social Development Commission	2015 Prgm No.	Program#3
		(A)	(B)	(C)
Acct. No.	Sub-Account Number	Account Description	2014 Gross Budget	2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$0.00
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$	\$
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	\$1,000.00
	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 *			\$	\$ 1,000.00
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	22,489
	9202	Transportation		
CONTROL ACCOUNT NO. 9200 SUB TOTAL*			\$	\$ 22,489
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 ***			\$	\$ 216,527

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

Rev. 6/14

Date (Initial):

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target Group **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Zone 3** 2015 Prgm No. **Program#3**
 Address **4041 N. Richards St./6848 N. Teutonia**

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		10,313
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	\$	\$ 10,313
	DHHS CONTRACT REQUEST		206,214
	TOTAL REVENUE	\$	\$ 216,527

Rev. 6/14

Date (Initial):

Date (Final):

Wisconsin Home Energy Assistance Program (WEAP) Social Development Commission Budget Page- 48

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name Community Relations-Social Development Commission
 P. / Qty/Target Groo Management Services: Wisconsin Home Energy Assistance Program
 Facility Name Program Name 2015 Prgm No. Program#3
Zone 3
 Address 4041 N. Richards St./6848 N. Teutonia

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		10,313
CONTROL ACCOUNT NO. 4300 SUB TOTAL*				10,313
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 Relations-Social Development Commission

2015 Prgm No.

Program#3

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 Relations-Social Development Commission	2015 Prgm No.	Program#3
Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Revenue Budget	(C) 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**				0.313

*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):

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 Relations-Social Development Commission
 ADDRESS & ADDRESS OF PROGRAM SITE Zone 4
2968 S. Chase Avenue
 AGENCY FEDERAL TAX ID NUMBER 39-1234567
 DHHS DIVISION Management Services: Wisconsin Home Energy Assistance Program
 PROGRAM NAME Program Name
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. Program#4

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: Month/Day/Hours/4-Hour/Other Other Applicants (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="0.00"/>	<input type="text" value="\$ 134,576"/>	<input type="text" value="\$"/>
2. Other Funding Source's Units and Costs	<input type="text" value="0.00"/>	<input type="text" value="\$ 22,284"/>	<input type="text" value="\$"/>
3. Total	<input type="text" value="0.00"/>	<input type="text" value="\$ 156,860"/>	<input type="text" value="\$"/>
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): DATE (FINAL):

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name: Community Relations-Social Development Commission

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Program Name	1	A	0
Program Name	1	B	0.175
Program Name	1	H	0
Program Name	1	I	0
Program Name	1	W	0
Program Name	2	A	0
Program Name	2	B	0
Program Name	2	H	0
Program Name	2	I	0
Program Name	2	W	0
Program Name	3	A	0
Program Name	3	B	0.425
Program Name	3	H	0.25
Program Name	3	I	0
Program Name	3	W	0
Program Name	4	A	0
Program Name	4	B	0
Program Name	4	H	0
Program Name	4	I	0
Program Name	4	W	0
Program Name	5	A	0
Program Name	5	B	0
Program Name	5	H	0
Program Name	5	I	0
Program Name	5	W	0
Program Name	6	A	0
Program Name	6	B	0
Program Name	6	H	0
Program Name	6	I	0
Program Name	6	W	0
Program Name	7	A	0
Program Name	7	B	0
Program Name	7	H	0
Program Name	7	I	0
Program Name	7	W	0
Program Name	8	A	0
Program Name	8	B	0
Program Name	8	H	0
Program Name	8	I	0
Program Name	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%	70.59%	29.41%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name Community Relations-Social Development Commisison
 Disability/Target Management Services: Wisconsin Home Energy Assistance Program
 Program Name Program Name 2015 Prgm No. Program#4
 Facility Name Zone 4
 Address 2968 S. Chase Avenue

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		82,051
7100	Employee Health & Retirement Benefits		14,399
7200	Payroll Taxes		15,268
8000	Professional Fees		5,250
8100	Supplies		6,000
8200	Telephone		2,500
8300	Postage and Shipping		650
8400	Occupancy		13,200
8500	Rental, Maintenance & Depreciation of Equipment		
8600	Printing and Publications		250
8700	Travel		
8800	Conferences, Conventions, Meetings		
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		1,000
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		16,292
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$	\$ 156,860
	PROFIT FACTOR		
	TOTAL EXPENSES INCLUDING PROFIT	\$	\$ 156,860
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		22,284
	TOTAL DHHS REQUEST	\$	\$ 134,576

Rev. 6/14

Date (Initial):

Date (Final):

Wisconsin Home Energy Assistance Program 2015 Wisconsin Home Energy Assistance Program Social Development Commission Budget Page- 54

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commission**
 Priority/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Program Name** 2015 Prgm No. **Program#4**
 Facility Name **Zone 4**
 Address **2968 S. Chase Avenue**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	14,169
	7002	Professional Salaries	\$0.00	19,500
	7003	Clerical Staff Salaries	\$0.00	48,382
	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*			\$	\$ 82,051
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$855.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$7,600.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$8,343.60
	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*			\$	\$ 14,399
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$6,376.94
	7202	Unemployment Insurance	\$0.00	\$8,041.05
	7203	Workmen's Compensation Insurance	\$0.00	\$500.51
	7204	Disability Insurance Premiums	\$0.00	\$350.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 15,268
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	\$180.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$100.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$4,000.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 5,250

*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		Community Relations-Social Development Commission	2015 Prgm No.	Program#4
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	\$1,000.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$2,000.00
	8108	New Goods Purchased	\$0.00	\$3,000.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8100 SUB TOTAL *			\$	\$ 6,000
8200	8201	Telephone Expense	\$0.00	\$2,500.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL *			\$	\$ 2,500
8300	8301	Postage and Parcel Post	\$0.00	\$650.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$ 650
8400	8401	Office Rent	\$0.00	\$12,000.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$0.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00
	8404	Mortgage Interest	\$0.00	\$0.00
	8405	Electricity	\$0.00	\$1,200.00
	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	\$0.00
	8410	Real Estate Taxes	\$0.00	\$0.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL *			\$	\$ 13,200
8500	8501	Equipment rental expenses	\$0.00	\$0.00
	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 *			\$	\$

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Relations-Social Development Commision	2015 Prgm No.	Program#4
Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
8600	8601	Printing	\$0.00	\$250.00
	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*			\$	\$ 250
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	\$0.00
	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*			\$	\$
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	\$0.00
CONTROL ACCOUNT NO. 8800 SUB TOTAL*			\$	\$
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
	8909	Recreation Service	\$0.00	\$0.00
	8910	Wage Supplements	\$0.00	\$0.00
	8911	Prosthetic Appliances	\$0.00	\$0.00
	8912	Hospital Fees	\$0.00	\$0.00
	8913	Testing Fees	\$0.00	\$0.00
	8914	Materials - Crafts, Vocation, etc.	\$0.00	\$0.00
	8915		\$0.00	\$0.00
CONTROL ACCOUNT NO. 8900 SUB TOTAL*			\$	\$

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name		Community Relations-Social Development Commision	2015 Prgm No.	Program#1
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	\$0.00
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$	\$
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	\$1,000.00
	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 *			\$	\$ 1,000.
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	16,292
	9202	Transportation		
CONTROL ACCOUNT NO. 9200 SUB TOTAL *			\$	\$ 16,292.
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***			\$	\$ 166,960

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

Rev. 6/14

Date (Initial):

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commision**
 Disability/Target Group **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Zone 4** 2015 Prgm No. **Program#4**
 Faculty Name
 Address **2968 S. Chase Avenue**

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		22,284
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	\$ -	\$ 22,284
	DHHS CONTRACT REQUEST		134,576
	TOTAL REVENUE	\$ -	\$ 156,860

Rev. 6/14

Date (Initial):

Date (Final):

Wisconsin Home Energy Assistance Program (WEAP) Social Development Commission Budget Page-60

FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commisison**
 City/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program **Program Name** 2015 Prgm No. **Program#4**
 Facility Name **Zone 4**
 Address **2968 S. Chase Avenue**

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		22,284
CONTROL ACCOUNT NO. 4300 SUB TOTAL*				22,284
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 Relations-Social Development Commision

2015 Prgm No. _____

Program#4

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 Relations-Social Development Commission		2015 Prgm No.	Program#4
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Revenue Budget	(C) 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 **				22,284

*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):

Date (Final):

Rev. 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 Relations/Social Development Commission
 ADDRESS & ADDRESS OF PROGRAM SITE: Zone 5
2968 S. Chase Avenue
 AGENCY FEDERAL TAX ID NUMBER: 39-1234567
 DHHS DIVISION: Management Services: Wisconsin Home Energy Assistance Program
 PROGRAM NAME: Program Name
 (SELECT FROM TABLE OF CONTENTS) 2015 Prgm No. Program#5

NUMBER OF DAYS PROGRAM OPERATES PER WEEK: 5.50
 NUMBER HOURS PROGRAM OPERATES PER DAY: 8.00
 NUMBER OF CASES TO BE SERVED PER YEAR * : 4,500.00

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~~ Other Applicants Other: (Specify)

COST CALCULATIONS:	TOTAL	PROGRAM	COST
	PROGRAM UNITS (A)	COST BY FUNDING SOURCE (B)	PER UNIT (C)
1. DHHS Program's Units and Costs	<u>0.00</u>	<u>\$ 173,898</u>	<u>\$</u>
2. Other Funding Source's Units and Costs	<u>0.00</u>	<u>\$ 4,129.0</u>	<u>\$</u>
3. Total	<u>0.00</u>	<u>\$ 178,027</u>	<u>\$</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): _____ DATE (FINAL): _____

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name:

Community Relations-Social Development Commission

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Program Name	1	A	0
Program Name	1	B	0.175
Program Name	1	H	0
Program Name	1	I	0
Program Name	1	W	0
Program Name	2	A	0
Program Name	2	B	0
Program Name	2	H	0.25
Program Name	2	I	0
Program Name	2	W	0
Program Name	3	A	0
Program Name	3	B	0.475
Program Name	3	H	0.3
Program Name	3	I	0
Program Name	3	W	0
Program Name	4	A	0
Program Name	4	B	0
Program Name	4	H	0
Program Name	4	I	0
Program Name	4	W	0
Program Name	5	A	0
Program Name	5	B	0
Program Name	5	H	0
Program Name	5	I	0
Program Name	5	W	0
Program Name	6	A	0
Program Name	6	B	0
Program Name	6	H	0
Program Name	6	I	0
Program Name	6	W	0
Program Name	7	A	0
Program Name	7	B	0
Program Name	7	H	0
Program Name	7	I	0
Program Name	7	W	0
Program Name	8	A	0
Program Name	8	B	0
Program Name	8	H	0
Program Name	8	I	0
Program Name	8	W	0

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

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

Ethnicity % to total FTE Rev: 6/14	A	B	H	I	W
	0.00%	54.17%	45.83%	0.00%	0.00%

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name **Community Relations-Social Development Commission**
 Division/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **Program Name** 2015 Prgm No. **Program#5**
 Facility Name **Zone 5**
 Address **2968 S. Chase Avenue**

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		100,617
7100	Employee Health & Retirement Benefits		15,698
7200	Payroll Taxes		18,621
8000	Professional Fees		5,350
8100	Supplies		6,000
8200	Telephone		
8300	Postage and Shipping		
8400	Occupancy		12,000
8500	Rental, Maintenance & Depreciation of Equipment		
8600	Printing and Publications		250
8700	Travel		
8800	Conferences, Conventions, Meetings		
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		1,000
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		18,490
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$ -	\$ 178,027
0.00%	PROFIT FACTOR		
	TOTAL EXPENSES INCLUDING PROFIT	\$ -	\$ 178,027
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		4,129
	TOTAL DHHS REQUEST	\$ -	\$ 173,898

Rev. 6/14

Date (Initial):
Date (Final):

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page-66
Item # 28 Form 3E5

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: **Community Relations-Social Development Commission**
 Divisibility/Task: **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name: **Zone 5** 2015 Prgm No. **Program#5**
 Facility Name: **Zone 5**
 Address: **2968 S. Chase Avenue**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	14,169
	7002	Professional Salaries	\$0.00	34,899
	7003	Clerical Staff Salaries	\$0.00	51,549
	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*			\$	\$ 100,617
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$855.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$7,800.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$7,043.19
	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*			\$	\$ 15,698
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$2,697.20
	7202	Unemployment Insurance	\$0.00	\$9,860.49
	7203	Workmen's Compensation Insurance	\$0.00	\$613.76
	7204	Disability Insurance Premiums	\$0.00	\$450.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 13,621
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	\$250.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$100.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$4,000.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 5,350

** Amount 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 Relations-Social Development Commission		2015 Prgm No.	Program#5	
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	\$1,000.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$2,000.00
	8108	New Goods Purchased	\$0.00	\$3,000.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
	CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$
8200	8201	Telephone Expense	\$0.00	\$0.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$	\$
8300	8301	Postage and Parcel Post	\$0.00	\$0.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$
8400	8401	Office Rent	\$0.00	\$12,000.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$0.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00
	8404	Mortgage Interest	\$0.00	\$0.00
	8405	Electricity	\$0.00	\$0.00
	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	\$0.00
	8410	Real Estate Taxes	\$0.00	\$0.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$	\$ 12,000
8500	8501	Equipment rental expenses	\$0.00	\$0.00
	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 *			\$	\$

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 68
Item # 28 Form 3SE5

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name Community Relations-Social Development Commisison		2015 Prgm No.	Program#5	
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8600	8601	Printing	\$0.00	\$250.00
	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* \$ - \$ 250.

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	\$0.00
	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* \$ - \$ -

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	\$0.00

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

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 Nat Community Relations-Social Development Commission			2015 Prgm No.	Program#5
Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
9000	9001	Individual Dues	\$0.00	\$0.00
	9002	Organizational Dues	\$0.00	\$0.00
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$	\$
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	\$1,000.00
	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 *			\$	\$ 1,000
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	18,490
	9202	Transportation		
CONTROL ACCOUNT NO. 9200 SUB TOTAL*			\$	\$ 18,490
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***			\$	\$ 178,027

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

Rev. 6/14

Date (Initial):

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target Group **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **2015 Prgm No. Program#5**
 Name **Zone 5**
 Address **2968 S. Chase Avenue**

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		4,129
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	\$ -	\$ 4,129
	DHHS CONTRACT REQUEST		173,898
	TOTAL REVENUE	\$ -	\$ 178,027

Rev. 6/14

Date (Initial): _____
 Date (Final): _____

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 71
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FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program **Program Name** 2015 Prgm No. **Program#5**
 Facility Name **Zone 5**
 Address **2968 S. Chase Avenue**

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		4,129
CONTROL ACCOUNT NO. 4300 SUB TOTAL*				4,129
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 Relations-Social Development Commisison 2015 Prgm No. Program#5

Control 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 Relations-Social Development Commisison		2015 Prgm No.	Program#5	
Control A 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		
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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		
------	--	-----------------------	--	--

CONTROL ACCOUNT NO. 6900 SUB TOTAL*

GRAND TOTAL**

4,129

*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):

Date (Final):

ev. 6/14

FORM 2B - EMPLOYEE DEMOGRAPHICS SUMMARY

Agency Name:

Community Relations-Social Development Commission

Program	Position Code (Column 2, Form 2 Code)	Employee Demographics (Column 3, Form 2 Ethnic group)	Number of FTEs
Program Name	1	A	0
Program Name	1	B	0.125
Program Name	1	H	0
Program Name	1	I	0
Program Name	1	W	0
Program Name	2	A	0
Program Name	2	B	0
Program Name	2	H	0.75
Program Name	2	I	0
Program Name	2	W	0.375
Program Name	3	A	0
Program Name	3	B	2.925
Program Name	3	H	3.7
Program Name	3	I	0
Program Name	3	W	0
Program Name	4	A	0
Program Name	4	B	0
Program Name	4	H	0
Program Name	4	I	0
Program Name	4	W	0
Program Name	5	A	0
Program Name	5	B	0
Program Name	5	H	0
Program Name	5	I	0
Program Name	5	W	0
Program Name	6	A	0
Program Name	6	B	0
Program Name	6	H	0
Program Name	6	I	0
Program Name	6	W	0
Program Name	7	A	0
Program Name	7	B	0
Program Name	7	H	0
Program Name	7	I	0
Program Name	7	W	0
Program Name	8	A	0
Program Name	8	B	0
Program Name	8	H	0
Program Name	8	I	0
Program Name	8	W	0

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

% of Handicaped employees 0.00%

A	B	H	I	W
0.00%	38.73%	56.51%	0.00%	4.76%

Ethnicity % to total FTE
Rev. 6/14

FORM 3 ANTICIPATED PROGRAM EXPENSES

Agency Name Community Relations-Social Development Commission
 Disability/Target Management Services: Wisconsin Home Energy Assistance Program
 Program Name Program Name 2015 Prgm No. Program#6
 Facility Name Zone 6
 Address 2968 S. Chase Avenue

Control Acct. No.	(A) Expenditure Description	(B)	(C)
		2014 Gross Budget	2015 Gross Budget
7000	Salaries		270,123
7100	Employee Health & Retirement Benefits		40,920
7200	Payroll Taxes		50,793
8000	Professional Fees		17,000
8100	Supplies		9,000
8200	Telephone		
8300	Postage and Shipping		
8400	Occupancy		84,000
8500	Rental, Maintenance & Depreciation of Equipment		3,000
8600	Printing and Publications		1,000
8700	Travel		
8800	Conferences, Conventions, Meetings		500
8900	Specific Assistance to Individuals		
9000	Membership Dues		
9100	Awards and Grants		500
9200	Allocated Costs (From Indirect Cost Allocation Plan, if appropriate)		55,265
9300	Client Transportation		
9400	Miscellaneous		
9500	Depreciation or Amortization		
9600	Allocations to Agencies, Payments to Affiliated Organizations		
	TOTAL EXPENSES	\$	\$ 532,101
0.00%	PROFIT FACTOR (for profit only)		
	TOTAL EXPENSES INCLUDING PROFIT	\$	\$ 532,101
	TOTAL NON-DHHS CONTRACT REV. BROUGHT FWD		4,129
	TOTAL DHHS REQUEST	\$	\$ 527,972

Rev. 6/14

Date (Initial):

Date (Final):

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: **Community Relations-Social Development Commission**
 Department/Target: **Management Services; Wisconsin Home Energy Assistance Program**
 Program Name: _____ 2015 Prgm No. **Program#6**
 Facility Name: **Zone 6**
 Address: **2968 S. Chase Avenue**

Control Acct. No.	Sub-Account Number	(A) Account Description	(B)	(C)
			2014 Gross Budget	2015 Gross Budget
7000	7001	Executive Salaries	\$0.00	10,121
	7002	Professional Salaries	\$0.00	51,649
	7003	Clerical Staff Salaries	\$0.00	208,352
	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*			\$	\$ 270,123
7100	7101	Accident Insurance Premiums	\$0.00	\$0.00
	7102	Life Insurance Premiums	\$0.00	\$2,011.00
	7103	Medical & Hospital Plan Premiums	\$0.00	\$20,000.00
	7104	Pension or Retirement Plan Premiums	\$0.00	\$18,908.59
	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*			\$	\$ 40,920
7200	7201	FICA Payments (Employer's Share)	\$0.00	\$20,664.38
	7202	Unemployment Insurance	\$0.00	\$26,472.02
	7203	Workmen's Compensation Insurance	\$0.00	\$1,647.75
	7204	Disability Insurance Premiums	\$0.00	\$2,009.00
CONTROL ACCOUNT NO. 7200 SUB TOTAL*			\$	\$ 50,793
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	\$300.00
	8008	Audit Fees	\$0.00	\$1,000.00
	8009	Electronic Data Processing Service Fee	\$0.00	\$0.00
	8010	Other Contract Payments to Consultants	\$0.00	\$200.00
	8011	Talent Fees	\$0.00	\$0.00
	8012	Other Purchased Services	\$0.00	\$15,500.00
CONTROL ACCOUNT NO. 8000 SUB TOTAL*			\$	\$ 17,000

** Not 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 Relations-Social Development Commission		2015 Prgm No.	Program#6	
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	\$2,500.00
	8107	Paper, Ink, Printing, Duplicating	\$0.00	\$3,500.00
	8108	New Goods Purchased	\$0.00	\$3,000.00
	8109	Raw Materials (Manufacturing) Purchased.	\$0.00	\$0.00
	8110	Manufacturing Supplies	\$0.00	\$0.00
	CONTROL ACCOUNT NO. 8100 SUB TOTAL*			\$
8200	8201	Telephone Expense	\$0.00	\$0.00
	8202	Telegraph Expense	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8200 SUB TOTAL*			\$	\$
8300	8301	Postage and Parcel Post	\$0.00	\$0.00
	8302	Freight	\$0.00	\$0.00
	8303	Messenger & Delivery Service	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8300 SUB TOTAL *			\$	\$
8400	8401	Office Rent	\$0.00	\$34,000.00
	8402	Other Bldg. & Parking Lot Rent	\$0.00	\$0.00
	8403	Bldg. & Bldg. Eq. Ins. (Gen. & Liability)	\$0.00	\$0.00
	8404	Mortgage Interest	\$0.00	\$0.00
	8405	Electricity	\$0.00	\$0.00
	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	\$0.00
	8410	Real Estate Taxes	\$0.00	\$0.00
	8411	Personal Property Taxes	\$0.00	\$0.00
	8412	Licenses & Permits-Occupancy Related	\$0.00	\$0.00
	8413	Bldg. & Grounds Maintenance Supplies	\$0.00	\$0.00
	8414	Miscellaneous Occupancy Costs	\$0.00	\$0.00
	8415	Amortization/Leasehold Improvements	\$0.00	\$0.00
	8416	Depreciation - Buildings	\$0.00	\$0.00
CONTROL ACCOUNT NO. 8400 SUB TOTAL*			\$	\$ 34,000
8500	8501	Equipment rental expenses	\$0.00	\$3,000.00
	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 *			\$	\$ 3,000

FORM 3S ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: Community Relations-Social Development Commission		2015 Prgm No.	Program#6	
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Gross Budget	(C) 2015 Gross Budget
8600	8601	Printing	\$0.00	\$1,000.00
	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* \$ - \$ 1,000

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	\$0.00
	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* \$ - \$ -

8800	8801	Meeting Space & Equipment Rental	\$0.00	\$0.00
	8802	Meeting Supplies (Notices,Badges,etc.)	\$0.00	\$500.00
	8803	Food & Beverages Costs(Mtg. Particip.)	\$0.00	\$0.00
	8804	Speaker's Honoraria & Expenses	\$0.00	\$0.00
	8805	Registration Fees	\$0.00	\$0.00

CONTROL ACCOUNT NO. 8800 SUB TOTAL* \$ - \$ 500

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* \$ - \$ -

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 80
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FORM 38 ANTICIPATED PROGRAM EXPENSES SUPPLEMENTARY SHEET

Agency Name: Community Relations-Social Development Commission			2015 Prgm No.	Program#6
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	\$0.00
CONTROL ACCOUNT NO 9000 SUB TOTAL*			\$	\$
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	\$500.00
	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 *			\$	\$ 500
9200	9201	Administrative Costs (Indirect Costs)	\$0.00	\$5,265
	9202	Transportation		
CONTROL ACCOUNT NO. 9200 SUB TOTAL*			\$	\$ 5,265
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***			\$	\$ 532,101

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

0.00

Date (Initial):

Date (Final):

FORM 4 ANTICIPATED PROGRAM REVENUE

Agency Name **Community Relations-Social Development Commisison**
 Disability/Target Gro **Management Services: Wisconsin Home Energy Assistance Program**
 Program Name **2015 Prgm No. Program#6**
 Zone **Zone 6**
 Address **2968 S. Chase Avenue**

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		4,129
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	\$ -	\$ 4,129
	DHHS CONTRACT REQUEST		527,972
	TOTAL REVENUE	\$ -	\$ 532,101

Rev. 6/14

Date (Initial):

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Date (Final):

Wisconsin Home Energy Assistance Program (WHEAP) Social Development Commission Budget Page- 83
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FORM 4S ANTICIPATED PROGRAM REVENUE SUPPLEMENTARY SHEET

Agency Name **Community Relations-Social Development Commission**
 Facility/Target **Management Services: Wisconsin Home Energy Assistance Program**
 Program **Program Name** 2015 Prgm No. **Program#6**
 Facility Name **Zone 6**
 Address **2968 S. Chase Avenue**

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	-	4,129
CONTROL ACCOUNT NO. 4300 SUB TOTAL*			-	4,129
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 Relations-Social Development Commisison 2015 Prgm No. Program#6

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 - Medicald	-	-
	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 *			-	-
6		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 Relations-Social Development Commisison	2015 Prgm No.	Program#6
Control Acct. No.	Sub-Account Number	(A) Account Description	(B) 2014 Revenue Budget	(C) 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**			-	4,129

*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-DIHS REVENUE"

Rev. 6/14

Date (Initial): _____
Date (Final): _____



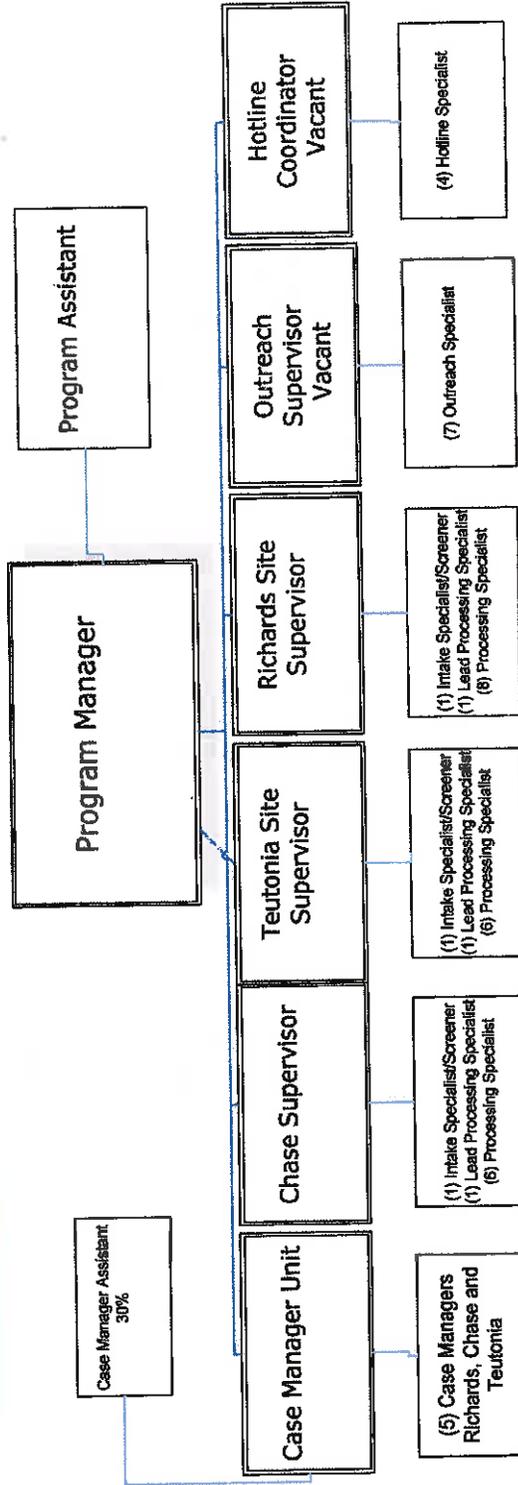
MSD-001
Wisconsin Home Energy Assistance Program (WHEAP)

PART 3

PROGRAM PROPOSAL

SOCIAL DEVELOPMENT COMMISSION ENERGY ASSISTANCE ORGANIZATIONAL CHART

PROPOSED



<p>Community Partners and Delegate Agencies in Milwaukee County</p>	<p>Marketing: Media marketing for outreach event through the distribution of flyers. Service information provided to Impact 211 for proper referrals, special mailings to targeted population, and distribution of informational flyers through local churches and partner organizations. Work with WE Energies to implement targeted marketing through bill distribution and incorporate into program flyers and website.</p>	<p>Flyers (20,000 in English, 5,000 in Spanish, 1,500 in Hmong) are distributed through community partners 4,000 clients are referred to EA through Impact 211 18,000 fixed-income residents receive informational letter describing application procedures</p>	<p>Potential clients have access to information from community agencies and informational flyers and letters.</p>	<p>Number of flyers distributed through community partners. Number fixed-income residents are mailed informational letter.</p>	<p>100% of clients who call Impact 211 receive response 100% of fixed-income and eligible elderly residents receive letter</p>			<p>100% of eligible applicants will be entered into HE+</p>
<p>SDC Staff Community Partners and Delegate Agencies in Milwaukee County</p>	<p>Application Intake Eligible applicants' completed applications are entered in HE+ system by SDC staff SDC operates all components (Regular Benefits, Crisis Services, and Outreach Services) of EA in 6 Services Zones.</p>	<p>25,000 applications are completed for residents who live in Zone 1 18,000 zone 2 applications are completed 6,000 Zone 3 applications are completed 18,000 Zone 4 applications are completed</p>	<p>Low-income Residents' energy burden is reduced.</p>	<p>Total number of applications entered in HE+</p>				

Items 29a and b partially comprise the points scored under Service Plan and Delivery
PROGRAM LOGIC MODEL and ANNUAL EVALUATION REPORT

ITEM # 29a

A	B	C	C1	D		E	F	G	H
				Expected Outcomes	Indicators				
Inputs	Processes/Program Activities	Outputs	For evaluation on report Actual level of achievement	Projected level of achievement	For evaluation report		Actual level of achievement	Description of change	
SDC Energy Assistance (EA) Staff	<p>Location and Operation SDC operates Home Sites in Zones 2, and 6 with relocation plans of home site within Zone 1 by January 2016.</p> <p>Outreach and temporary EA Intake sites through community partners in Zones 1, 3, 4, and 5.</p> <p>Phone System SDC operates a Hot Line 7:00am-5:30pm. After hour support from 211 for no heat calls.</p> <p>SDC Website Website provides information such as locations, schedules of operation and list of documents needed.</p>	<p>On an annual basis, 76,500 Low-income eligible Milwaukee County Residents will have access to EA service sites.</p> <p>Average of 7,000 calls/month are received through SDC Hot Line</p> <p>10,000 residents find EA information on SDC website</p>	<p>Low-income Milwaukee County residents will have easy access to EA services in all 6 Service Zones</p> <p>Milwaukee County residents have access to information about EA site locations, eligibility, and application processes.</p>	<p>Number of applications completed at each Service Zone.</p> <p>Number of telephone calls and voice mail messages received at SDC EA Hot Line</p> <p>Number of website visits</p>	<p>100% of potential applicants will have access to EA service locations</p> <p>100% of all client inquiries will be addressed by Hot Line staff or through information posted on SDC Website.</p>	<p>Actual level of achievement</p> <p>Description of change</p>	<p>Actual level of achievement</p> <p>Description of change</p>		

	<p>Application locations in Service Zones 1, 2, and 6 will operate Monday-Friday 7:30am to 4:30 pm.</p> <p>Additional Application locations in Service Zones 3, 4, and 5 will be available 2-days/week during peak application periods.</p> <p>SDC will extend operations to one evening/week (8:00pm) and on Saturdays during peak periods at each of its Home Sites (October-November, and March-May 15).</p>	<p>4,500 Zone 5 applications are completed</p> <p>5,000 Zone 6 applications are completed</p> <p>4000 homebound residents will complete applications through home visits or telephone.</p> <p>10,000 elderly or disabled residents complete early application</p>		<p>Home-bound and elderly residents' energy burden is reduced</p>	<p>Total number of home-bound resident applications entered in HE+</p> <p>Total number of early applications completed and entered in HE+</p>	<p>100% of home-bound residents will be entered into HE+</p> <p>100% of early applicants will have their applications entered into HE+</p>		<p>SDC EA Managers and supervisors</p> <p>SDC Quality Assurance Staff</p>	<p>Quality Assurance</p> <p>SDC EA Manager tracks and monitors processes and submits monthly reports of all activity performed on the contract.</p> <p>SDC Quality Assurance</p>	<p>EA manager Submits monthly reports to Milwaukee County</p> <p>QA and Site Coordinators review 5% of all applications for accuracy</p>		<p>SDC is compliant with WHEAP program requirements</p> <p>SDC staff is knowledgeable of WHEAP application procedures</p>	<p>Results of EA program reports and evaluations by internal QA and external Milwaukee County evaluations</p> <p>Results of 5% monitoring processes</p>	<p>100% of monthly program reports are submitted on time.</p> <p>Evaluations demonstrate 100% compliance</p> <p>100% accuracy of reviewed applications.</p>	
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	<p>Manager monitors EA performance standards. EA staff analyzes results of customer surveys</p> <p>SDC Finance Director oversees program expenditures</p> <p>Staffing</p> <p>SDC will maintain program staff for operations:</p>	<p>EA Manager is the primary contact and oversees all operations</p> <p>EA Assistant</p> <p>3 Site Supervisors directly oversee daily operations and staff at EA sites</p> <p>3 Lead Processing Specialists oversee application activities</p> <p>1 Outreach Supervisor oversees outreach requests</p> <p>7 Outreach Specialists provide services to homebound clients</p> <p>3 Receptionists/Screeners conduct preliminary intake</p> <p>1 Hot Line Coordinator oversees Hot Line</p>	<p>Clients indicated satisfaction with customer service</p> <p>All EA program expenditures are reviewed by program manager and agency leadership</p> <p>SDC hires qualified staff who provide high quality services to EA clients</p> <p>SDC responds to client inquiries and complaints in timely and professional manner</p>	<p>Results of client surveys</p> <p>Results of monthly grant accounting reports</p> <p>Total number of qualified staff hired</p> <p>Questions and complaints responded to and resolved according to WHEAP program manual</p>	<p>100% of EA clients are invited to complete Satisfaction Survey</p> <p>100% of program expenditures are allowable</p> <p>100% of hired staff are fully qualified to work in the program</p> <p>100% of client inquiries are addressed and resolved.</p>	
SDC Human Resources						

Item 29c

Item 29c and Item 29e are not applicable for SDC as we are a current provider.

**COMMUNITY RELATIONS-SOCIAL DEVELOPMENT COMMISSION (SDC)
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AGENCY BACKGROUND AND EXPERIENCE

Community Relations-Social Development Commission (SDC) is a long-serving Community Action Agency that has provided services to low-income families since its creation in 1964. The purpose of Community Action Agencies (CAAs) is to address poverty through advocacy, research, and the establishment of poverty reduction programs. For over 50 years, SDC has served as a planner, coordinator, and provider of human service programs for low-income individuals and families in Milwaukee County. As an intergovernmental agency, SDC's central purpose is "to study, analyze and recommend solutions for major social, economic and cultural problems which affect people residing or working within" the municipality. As a quasi-government agency, the SDC is accountable to meeting federal guidelines, requirements, policies and procedures through administrative and quality assurance staff that oversee programs and report on outcomes and grant expenditures. SDC coordinates its program and fiscal activities under federal, State and local requirements that include (but not limited to) the OMB Uniform Circular, and Generally Accepted Accounting Practices (GAAP). In addition SDC holds an ISO-9001 Certification and implements best practices in agency conduct.

In Wisconsin, SDC is the largest of the sister Community Action Program (CAP) agencies, providing active leadership and participating in collaborative initiatives. SDC's mission is committed to "Empowering Milwaukee County residents with the resources to move beyond poverty". To do this we operate over 20 supportive services and poverty reduction programs and maintain active partnerships with more than 200 external agencies who also serve Milwaukee County residents. SDC believes that when families and individuals have access to a network of resources and services, they are better able to improve their economic stability. Therefore, the SDC staff operates its programs through an Integrated Service Delivery Network. SDC's implementation of the Wisconsin Home Energy Assistance Program (WHEAP), for example, is integrated into its in-house network of services including free tax preparation, adult education, job training and placement services, and home repair services. Table 1 below is a summary of SDC integrated services opportunities.

Core Service Areas	Specific Programs
Education Services	GED/HSED education and testing for high school diploma equivalency. SDC is certified as a Pearson Vu testing site for GED, and a certified Accuplacer Diagnostic Testing site.
Career Enhancement and Employment Services	Education for young adult and youth career development, soft skills training, college readiness and assessments, career orientation, job training and placement.
Residential Services	Weatherization Assistance, Emergency Furnace, Healthy Homes, Lead Hazard Reduction, & Neighborhood Improvement for housing revitalization.
Nutrition Services	SDC contributes to the development of children and youth by helping to satisfy their basic nutritional needs. SDC prepares and delivers nutritious meals and snacks to day care centers and after school programs.
Health Services	AODA/mental health counseling, alternative therapies, Prescription Advocacy Referral Service (PARS), and Senior Companions.
Supportive Services	Financial capability training, access to bank services, credit management, and Volunteer Income Tax Assistance (VITA), Project GAIN to improve financial stability for at risk families, and Energy Assistance to reduce the energy burden for low-income families.
Family Strengthening	Healthy relationships programs for families and peers, teen pregnancy prevention, community service, gang diversion, and deferred prosecution agreements.

Agency History with Energy Assistance

SDC has served as an Energy Assistance (Referred to as EA in this proposal narrative) provider since 1978. The Energy Assistance staff and administrative leadership have extensive experience in the implementation of all program components (Regular Benefits, Outreach, and Crisis Assistance), and is well versed in troubleshooting and responding to the seasonally high demand application periods.

Year	Number of Applications	% of Total Applications
2009-10	50,768	80%
2010-11	48,110	75%
2011-12	47,488	77%
2012-13	51,627	83%
2013-14	49,104	72%
Total Applications	247,097	

Through years of experiences in the operation of Energy Assistance, SDC has acted as a significant player as Milwaukee County and the State of Wisconsin worked to streamline an effective model to serve clients as efficiently as possible. At one time SDC operated more than ten (10) EA sites county-wide, performing data analysis at the end of each season and using that information to identify and track the movement of the low-income population. This data also allowed us to focus our

outreach activities to ensure that the most vulnerable clients were placed as a high priority in reference to resource distribution and development of operating schedules.

As shown in Table 2 above, in the last five years alone, SDC has completed over 247,000 EA applications on behalf of Milwaukee County residents. Our highly regarded reputation and capacity to exceed program outcomes is supported by the funding SDC receives from the Milwaukee County Department of Health and Human Services and WE Energies (Public Benefits). SDC further commits a portion of its Community Services Block Grant (CSBG) funds to operate the Energy Hotline (Call Center) and to increase the number of staff who are needed during peak periods in October through November and then again in March through mid-May of each fiscal year.¹ The diversity of funding and community resources are some of the reasons SDC has been able to serve upwards of 72%- 83% of all EA clients annually at multiple locations for the past five years. In the 2013-14 funding year, for example, we provided Energy Assistance services to 72% of all Milwaukee County residents served. During this same period SDC was able to manage the EA program with only 58% of the total funds available for Milwaukee County residents. This efficient management has been the case historically. In 2012-13, SDC processed 83% of all applications while receiving only 58% of funds. Additional funding from CSBG has allowed us to manage a larger volume. Appendix 1 demonstrates the historic outcomes and allotted funding since 2012.

SDC's capacity to operate an effective EA program is further supported by:

- o The operation of related energy-based programs that operate at our Home Sites, providing an opportunity to maximize the use of our resources and improve the overall efficiencies of households in Milwaukee County. This includes the operation of the Furnace Repair and Replacement program in our Residential Services division. In 2014, SDC replaced furnaces for 133 housing units and repaired 96. The SDC Residential Services is also one (1) of three (3) providers of Weatherization Assistance which provided energy reduction services on 750 units during the same period of time;
- o The inclusion of year-round support including access to language interpretation for customers with Limited English Proficiency;

¹ In 2014-15, SDC contributed \$100,000 in CSBG funding to enhance EA activities.

- The inclusion of home visits and outreach services for fixed income elderly and residents with disabilities. Presentations at senior centers and housing facilities are also conducted by EA Staff to extend awareness and bring services closer to places where vulnerable residents live;
- The inclusion of home-based energy audits, and energy demonstrations for customers to reduce energy usage in their homes or apartments;
- The operation of an Energy Hotline and voicemail system.² During the EA heating season, the Energy Hotline is operated by full time staff who respond to inquiries and complaints and return voicemail messages. Prior to the state of the 2014-15 season (August-October), the Energy Hotline fielded 13,614 callers needing assistance or information. Additionally more than 29,000 callers accessed SDC's information line to follow prompts that led to recorded information about the program;
- Systematic client referrals to any of SDC's integrated services listed in Table 1, that keep families safe and economically stable;
- Assistance with emergency restoration of heating and electric services;
- The inclusion of strong partnerships with community agencies who promote EA to their clients and extends our outreach opportunities to serve vulnerable groups. SDC also manages relationships with Delegatc agencies who are authorized to complete paper EA applications and forward those applications to SDC staff;
- The establishment of a strong relationship with WE Energies to connect residents with reasonable payments plans for delinquent accounts; and
- The utilization of wraparound resources and services from partnering community agencies who work to connect their clients to EA services.

Lastly, SDC's experience in the operation of various federal programs demonstrates how Energy Assistance is part of an integrated network of supportive programs in one-stop environment that is convenient for our clients. Full time finance staff and program staff ensure that activities and expenditures are appropriate and accountable. Table 3 summarizes some of the federal programs SDC successfully manages that also benefit EA clients.

Table 3: SDC Program Service Mix

Program Name	Funding period	Funder	Program volume	Target Population	Dollar amount	Service Mix
Energy Assistance	Oct 1 2013- Sept 30, 2014	Milwaukee County Dept. of Health and Human Services	49,104	Low-income Milwaukee County Residents	\$1,587,797	Energy Assistance Proactive-Crisis Services
		WE Energies (Public Benefits)			\$225,000	Referrals to supportive services
Furnace -- Replacement Repair	October 1 2013 - Sept 30 2014	WHEAP Wisconsin Department of Administration	607 referrals with 578 housing units receiving	Low-income homeowners	\$415,137	Energy Assistance Furnace Repair/Replacements

² Also referred to as the SDC Call Center

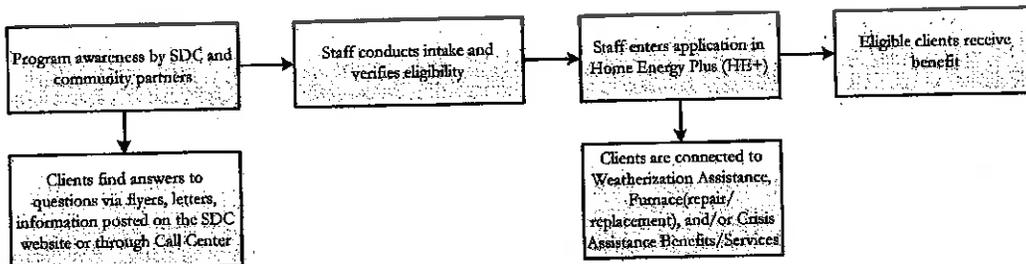
			repairs or replacement			
Community Services Block Grant	January 1-December 31, 2014	Wisconsin Department of Children & Families	78,000 clients served	Low-income Milwaukee County residents	\$2,021,802	Energy Assistance VITA Senior Companions Education & Training Youth and Family
Volunteer Income Tax Assistance (VITA)	June 1 2013-May 31, 2014	US Department of Internal Revenue	16,220 tax returns completed	Low-income working families	\$80,000	Free tax preparation Financial Literacy Financial Coaching
Residential Services	July 1, 2013-June 30, 2014	Wisconsin Dept of Administration Housing & Urban Development City Milwaukee CDBG HOME	750 housing units rehabbed	Low-income homeowners and renters	\$5,567,000 WX \$1,000,000 Lead Hazard \$388,779	<ul style="list-style-type: none"> • Weatherization Assistance • Lead Hazard Reduction • Neighborhood Improvement (NIP)
Gaining Access to Income Now (Project GAIN)	July 1 2013-June 30 2014	Children's Trust Fund	230 families	Low-income Families with children under age 5	\$300,000	Free financial advocacy and one-on-one counseling Referrals to public benefit programs Crisis assistance

PROGRAMS

Regular Benefits

SDC operates Energy Assistance (EA) regular benefits with an integrated approach and a focus on helping low-income families manage their household energy expenses and reduce the energy burden. According to the Wisconsin Community Action Program (WISCAP), while the average Wisconsin family spends 3% of their income on energy, low-income families spend closer to 12% to meet those same costs. With higher economic burdens, families find themselves making difficult decisions to pay their energy bill, pay their rent, or buy food to feed their children. The high energy burden is further aggravated by poor housing conditions that do little to conserve energy, resulting in extraordinarily high bills. Low-income families connect to diverse resources that help them better manage their households and reduce their energy burden by accessing regular benefits that include SDC's Weatherization Assistance, Furnace Repair and Replacement program, and Energy Conservation Demonstrations.

Within the EA program the SDC staff works to ensure eligible residents are aware of program benefits and are able to submit their applications for assistance easily. To ensure the seamless operation of program benefits SDC manages a one-stop shop of centralized services and year-round assistance. As an initial step for all program enrollments, potential clients first complete the regular benefits application. The flow chart below summarizes the program process:



Crisis Assistance Benefits/Services

SDC provides year-round Crisis Assistance which is also managed within our Energy Assistance program. The clients we serve in Crisis Assistance are families and individuals who struggle with emergency situations or who face the challenges of paying monthly bills that are related to meeting basic needs including housing, food, health, employment, education, and energy. Our purpose is to not only strengthen families and provide them with energy crisis assistance and case management, but also lay the foundation to enhance their financial capacity and ability to manage their household income to meet basic needs. SDC provides effective services and takes on a systematic approach to ensure low-income residents are aware of their options and are connected to real solutions to meeting financial obligations and keeping their energy services open. While Crisis Assistance is available to low-income residents on a year-round basis (pending the availability of funds), SDC has experienced that the most demand for services is prior to and after the WE Energies moratorium on winter shut offs is lifted.

To help clients meet financial obligations and prevent disconnection, SDC coordinates its Crisis Assistance efforts with WE Energies. Each year, after a required winter moratorium on services is about to be terminated, clients whose account arrearages place them in danger of losing their electric and heating services receive an informational letter from Milwaukee County. This letter is mailed according to a list that is generated by WE Energies and distributed to Milwaukee County. To make sure that clients are aware of payment options, telephone numbers for SDC Energy Crisis Services and other contact information is included in the letter. WE Energy clients who live in low-income households are encouraged to contact SDC to set up payment plans and apply for financial assistance. Clients who apply for Crisis Assistance must first apply for the Energy Assistance program which is available during the regular heating season, October 1- May 15. Potential Crisis Assistance clients contact program staff through the SDC Energy Assistance Hotline or by calling Impact 211.

The processing of Crisis Assistance is based on guidelines included in the Wisconsin Home Energy Assistance Program Operations Manual and that which is set by the local work group from Milwaukee County. Some of these specific processes and guidelines are summarized here:

- SDC staff operate Proactive Assistance as a year round (October 1-September 30) program. Services during the non-heating season are primarily in response to disconnection threats that occur outside of the heating season moratorium.
- SDC staff checks to see that clients are first enrolled in Energy Assistance and that they have received Energy Assistance before they are eligible for Crisis Assistance.
- SDC staff verifies household income as below 60% of State Median Income, based on income statements, recent pay checks or other documents that confirm earnings.
- The EA program staff examines energy accounts to determine payment activity and Crisis Assistance participation in the past. Staff confirms that energy accounts are set up as a direct pay option.
- Clients who have met program eligibility by making a contribution of at least four payments (at a minimum of \$35.00 per month) in the past six months are provided up to \$300 in assistance. The amount of Crisis Assistance is determined as the amount needed to prevent disconnection. Elderly residents are eligible for up to a \$400 benefit.
- As required under the Energy Assistance contract, program staff responds to Crisis Assistance requests within 48 hours; Life threatening situations (such as a non-functioning furnace in the winter) are responded to within 18 hours of the request.
- Denials for Crisis Assistance will be responded to prior to 48 hours. Clients will also receive a denial letter within 30 days, noting the reason for denial.³
- Clients who receive Crisis Assistance for the third consecutive year are required to attend a financial workshop and will be connected with a EA Case Manager. Case Managers will provide residents with an opportunity to make best use of economic resources and improve their management of household income and spending. The Case Management team will also refer clients to additional SDC or community resources.
- Program staff enters notes with each application with information that may qualify eligibility exceptions.⁴ Notes are submitted on the Home Energy Plus (HE+) application and database system that will support evidence of the energy burden.
- 100% of all applicants whether eligible or not, will be referred to additional SDC and community resources including FoodShare, workforce development assistance, adult education services, Medical Assistance, Rent Assistance, Child Care Assistance and Earned Income Tax Credit.

Emergency Furnace and Repair Services

A significant issue within the Energy Crisis Assistance program is when low income homeowners' furnace ceases to operate or poses a safety or health threat to families. During winter months it is especially crucial to respond without delay. It is fortunate that SDC is also a local provider for Weatherization Assistance services for Milwaukee County residents and is able to easily administer the

³ HE+ System generates denial letters.

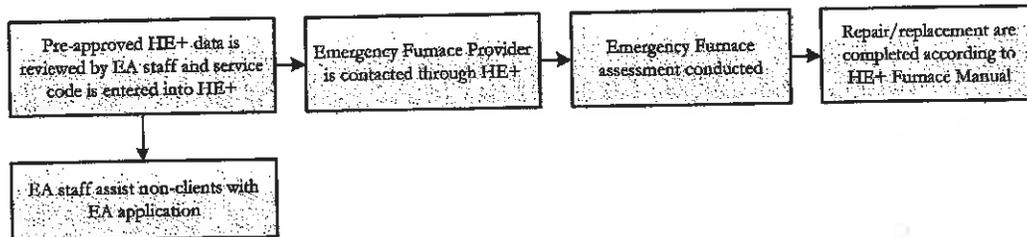
⁴ For example, clients who have not had an open account for a minimum of six months will not have made the required payments, but would be accepted based on financial need.

discretionary benefits that address faulty heating systems. This advantage makes a significant impact on response time for families who are left without a working furnace. Eligibility status is determined by the Energy Assistance staff that refers clients to the Weatherization Assistance program.

Through the process of the EA application, SDC staff ensures that all EA clients are aware of the availability of Emergency Furnace services should the need arise. In partnership with Impact 211 that coordinates all after-hours calls, the EA staff is prepared to respond to emergency situations for our EA clients. During winter months and in the event of a no heat situation, requests for Emergency Furnace assistance starts with a confirmation that the potential client is currently receiving EA. After a review of the application and a verification of property ownership, the SDC case manager simply inserts a service code into the state-supported Home Energy Plus (HE+) data system which in turn contacts the respective provider of Emergency Furnace. In Milwaukee County, there are two providers: SDC, and the La Casa de Esperanza. Targeted service areas are divided into census tracts which are managed by the designated provider. Thus, even though a client has applied for EA with SDC, they may receive emergency services from La Casa. In the event of an emergency request after hours, an on-call staff member in the designated provider organization is responsible to follow through. If the prospective client does not have a current EA application in HE+, the Crisis Assistance Case Manager processes the completion of the application over the phone or arranges for an immediate visit with the applicant in their home.

The Weatherization staff then completes a home assessment to determine appropriate action in accordance with the Emergency Furnace program criteria and creates a scope of work that indicates specific repairs or furnace replacement. Written scopes of work are forwarded to community vendors who complete the repair or install a new furnace in a timely manner. All furnaces that are replaced meet energy efficiency standards, permits, and applicable codes and regulations. The Weatherization program staff assesses these requirements through a follow up home visit and inspection.

A flow chart illustrating the service delivery for this service is summarized below:



Weatherization Assistance

Weatherization Assistance is a poverty reduction program whose primary goal is *“to increase the energy efficiency of dwellings owned or occupied by low-income persons, reduce their total residential energy expenditures, and improve their health and safety, especially low-income persons who are particularly vulnerable”* Weatherization includes energy audits, furnace and water heater replacements with Energy Star rated appliances, electrical updates, and the addition of insulation in attics and walls. SDC is also one of three providers of Weatherization Assistance in Milwaukee County which include

nonprofit agencies, La Casa de Esperanza and Partners for Community Development. The Weatherization Assistance program operated by SDC is designed to address the energy challenges that our older housing stock in Milwaukee presents. Poor energy efficiency in older homes increases heating costs, leading to higher energy bills. The benefits low-income families receive from EA is further compounded through the addition of Weatherization Assistance updates that make housing units more energy efficient.

With SDC's integrated approach to improving our housing stock in Milwaukee, homeowners and renters who receive Weatherization Assistance may also learn about additional housing resources that make housing more affordable and safe for families. This includes the operation of the Neighborhood Improvement Project which addresses home efficiencies, property code violations, and safety issues, and our Lead Hazard Reduction program that protects the health and well-being of families who have children under age 6 in the household. SDC also provides home demonstrations that teach families how to maintain their home systems (such as furnaces and water heaters) and simple tasks that homeowners can conduct to keep their homes efficient and safe. Residents then receive a Weatherization Guidebook that tailors maintenance activities to their individual residence and includes an easy to follow schedule of routine jobs.

As with the Emergency Furnace, the first step in receiving Weatherization Assistance is to complete an application for EA. All EA households are automatically eligible for Weatherization Assistance and are added to a service waiting list. The SDC Residential Services staff receives a pre-approved list of eligible clients who are then contacted by Weatherization Assistance staff to complete the application process. Once that is completed the Weatherization staff conducts a home energy assessment which is a valuable tool that directly examines housing units and targets energy efficiency and reducing costs.

SERVICE AREAS

As the designated Community Action Agency for Milwaukee County, SDC is able to provide Energy Assistance, Crisis Assistance, and Outreach to all six Service Zones as identified by the WHEAP Request for Proposals (RFP) document. Our capacity to meet program outcomes is based on the estimated program budget of \$1,329,254 for Administration and Operations, \$581,797 for Crisis Services, and \$311,417 for Outreach Services. In addition, SDC is often able to contribute a portion of Community Services Block Grant (CSBG) funds to meet the actual costs of the program which will support our goal in serving 76,500 applicants annually.

The program staff hired to provide EA services represent the demographic and cultural makeup of the population of the community where EA, Crisis Assistance, Furnace, and Weatherization Assistance are offered to eligible residents. This staff representation will ensure that clients with Limited English Proficiency (LEP) have access to interpretation assistance or are matched with an Intake or Processing Specialist who speaks the language. For example, the availability of Spanish speaking staff in Zone 6 ensures that the larger population of Spanish-speakers who live in the designated area are able to participate in the application process through their primary language. Partnerships with refugee resettlement agencies and the Hmong American Friendship Association (HAFA) will provide language support to assist in the application process for Hmong-speaking residents and other languages represented by Milwaukee's population of refugees. SDC staff has further access to telephone translation services if needed which is included in SDC's written LEP Guide. A Language Card allows

clients to identify their primary language to the EA Intake Staff who can then arrange for translation services as needed. Clients are also encouraged to bring along a bilingual speaker who is a family member or friend when they come in for assistance.

To meet the program goals of providing intake, outreach, and crisis services in each Service Zone, SDC proposes to coordinate activities with our existing community partners that include Head Start sites, senior residential facilities, recreation sites, churches, and community centers. A list of Senior residential sites and other community partners who help with outreach activities are included in Appendix 2. This, in addition to operations at SDC's Home Sites will ensure that residents have easy access to EA. The summary below addresses these activities for each Service Zone:

- **SDC Home Sites:** SDC will operate three Energy Assistance Home Sites in existing facilities located in Zone 2 and Zone 6. Our current locations at 2968 South Chase Avenue, 4041 N. Richards Street, and 6850 N. Teutonia Avenue are familiar to current EA clients and are accessible via Milwaukee County Transit. An additional partnership with the Bay View Community Center in Zone 6 will also expand outreach and application services with opportunities to apply for EA during peak periods at least one day per week.⁵
- **Service Zone 1:** SDC will also operate a full time schedule for services in partnership with the Greater New Birth Church. See attached letter of commitment included here in Appendix 3. SDC is currently seeking to relocate one of our Home Offices (Richards Street) when our lease expires in December 2015. At the time of this writing, SDC is looking for a new location with a priority in Service Zone 1 where nearly 22,000 current EA recipients live.
- **Service Zone 3:** Partnership with senior housing complexes and other community centers will provide ongoing promotion, and outreach services. Application services in this Zone will operate at least one day per week during peak periods.
- **Service Zone 4:** SDC will partner with New Concept Self Development and the Hmong American Friendship Association (HAFA) to provide outreach and application intake services. Periodically throughout the season, households living in this Zone can also apply for EA at one of our Home Sites in Zone 1, 2, or 6. Letters of commitment from these partners are included in Appendix 4 and Appendix 5.
- **Service Zone 5:** SDC will provide promotional resources, outreach services to the general population, and home visits to home-bound clients. In partnership with the Wilson Senior Center operated by Interfaith for Older Adults, application intake services will be provided during peak application periods. During less demanding periods, households can apply for EA at one of our Home Sites in Zone 6.

SDC will provide ongoing outreach and promotional activities in collaboration with community partners, churches, and schools located in each Service Zone. Additional support from Delegate Agencies further expands our outreach services. Delegate agencies are authorized to work with their

⁵ The usage of the term "peak periods" in this proposal refers to the time period of October-November and then again in March through May 15th of each year.

own clients to verify eligibility (including income verification and residence) and complete paper applications for Energy Assistance. Delegate agencies then forward completed applications to SDC staff who enter the information in HE+ and verify all signature certifications. Ongoing activities will allow the EA program staff to focus on specific populations, enhance access to language translations, respond to questions about the program, and even provide intake services when appropriate resources are available.⁶

In Table 4 below, service demographics and a summary of service delivery methods is outlined for each Service Zone. Our estimations on number of clients SDC expects to serve is based on outcomes experienced during the 2013-14 energy season, and on the total number of eligible households living in poverty. Appendix 6 is a summary of poverty status of individuals by zip code in each Service Zone.

Table 4: Service Sites for Intake and Outreach			
Zone	Zip Codes Covered	Service Demographics based on 2013-14 Energy Season	Methods of Service Delivery
1	53210 53216 53218 53222 53223 53224 53225	Eligible Households: 77,262 2014 Applications: 21,928 Home Visits/Phone Visits (HV/PV): 1,372 (Outreach) Crisis: 6,088	<ul style="list-style-type: none"> ✓ (10) Senior Housing Complexes = more than 900 served. ✓ Open Alternate sites @ Greater New Birth Church – 8237 W. Silver Spring [5 Outreach workers @ 5 days/week – Oct. through May 15] = 19,700 served. Northwest Health Center- 7630 W. Mill Road include 3 days/week Keenan Health Center- 3,200 N. 36th Street include 2 days/week ✓ (7) Additional Outreach Sites identified in zone (Head Start Sites, churches and community centers) ✓ Proposed Zone for Future SDC Home Site <p>Total Applications in 2015-16 = 25,000</p>
2	53206 53209 53211 53212 53217	Eligible Households: 68,338 2014 Applications: 15,560 HV/PV: 921 (Outreach) Crisis: 4,756 In 2013-14 SDC provided services to 35,481 clients from our Teutonia and Richards Street Home sites	<ul style="list-style-type: none"> ✓ Currently have 2 Home Sites within zone with plans to relocate one in January 2016. ✓ Increase capacity for Teutonia site – Add 2 workers ✓ Increase capacity for Richards Home Site until move – Jan 2016 – 2 additional workers ✓ Outreach : (16) Senior Housing Complexes = more than 1,125 served; ✓ (5) Additional Outreach Sites identified in zone (Head Start Sites, churches and community centers) ✓ (2) delegates for special/vulnerable population <p>Total Applications in 2015-16 = 18,000</p>
3	53213 53214 53219 53226	Eligible Households: 61,548 2014 Applications: 4,973 HV/PV: 737 (Outreach) Crisis: 933	<ul style="list-style-type: none"> ✓ (3) Senior Housing Complexes = more than 111 served ✓ (2) Additional Outreach Sites identified in zone (Head Start Sites, churches and community

⁶ For example, SDC staff would have to be able to log into HE+ to provide intake services. This is not always possible when visiting other locations. In these cases, paper application may be completed onsite and entered into HE+ within 24 hours.

	53227		centers) ✓ (1) Use of delegate agencies for special vulnerable population Total Application in 2015-15 = 6,000
4	53202 53203 53204 53205 53208 53215 53233	Eligible Households: 68,232 2014 Applications: 16,273 HV/PV: 737 (Outreach) Crisis: 4,391	✓ Open Alternate site @ HAFA – 3824 W. Vliet St. [1 worker @ 5 days/week – Oct. through May 15] = 3,900 served ✓ New Concept Self Development located in the King Center – [3 workers, October through May 15 by appointment only = 11,000 served. ✓ Special hosted Outreach site at Catholic Charities – 2021 N. 60 th St. – (with clients served by 4 resettlement agencies – Catholic Charities, Lutheran Social Services, Pan-African Community Assoc. and International Institute of WI) – serving Asian, Burmese, Iraq and Somalia population and providing translation assistance. ✓ (14) Senior Housing Complexes = more than 786 served ✓ (4) Additional Outreach Sites identified in zone (Head Start Sites, churches and community centers) ✓ (6) Use of the support of delegate agencies for special vulnerable population Total Applications in 2015-16 = 18,000
5	53129 53130 53132 53220 53221 53228	Eligible Households: 56,633 2014 Applications: 3,977 HV/PV: 381 (Outreach) Crisis: 669	✓ (7) Senior Housing Complexes = more than 700 served ✓ (1) Additional Outreach Sites identified in zone (Head Start Sites) Total Applications in 2015-16 = 4,500
6	53110 53154 53172 53207 53235	Households: 51,614 2014 Applications: 4,318 HV/PV: 378 (Outreach) Crisis: 684 In 2013-14, SDC provided services to 13,623 residents at the Chase Street site. Which is currently divided between Zone 6 and Zone 4	✓ Currently have a Home Site within zone ✓ Increase capacity at Home Site – Add 1 worker ✓ Open Alternate site @ Bay View Community Center – 1320 E. Oklahoma Ave [1 Outreach worker @ 2 days/week – Oct. through May 15] = more than 1,550 served] ✓ Alternate site at the Brinton Center- 2555 S. Bay Street @ 1 day/week ✓ (12) Senior Housing Complexes = more than 1,043 served ✓ (4) Additional Outreach Sites identified in zone (Head Start Sites, churches and community centers) Total Applications in 2015-16 = 5,000

ACTIVITIES

To continue to serve Milwaukee County residents with Energy Assistance services, the SDC will comply with the requirements described in the 2015 revised version of the Wisconsin Home Energy

Assistance Program (WHEAP) Operations Manual. A full description of the operation of the EA program follows:

Location and Hours of Operations

To ensure that residents have access to services in each Service Zone, SDC coordinates our EA services at our three Energy Home Sites, and through our relationships with other community organizations. All application sites, including the SDC Home Sites and partnering agencies, are located in facilities that are accessible and located near a Milwaukee County transit stop(s). Upon award, SDC will coordinate additional operational hours in collaboration with the current W2 agencies. Below is a summary of how SDC will operate the schedules of EA in each Service Zone:

- **Service Zone 1:** SDC partnership with the Greater New Birth Church will add services at 5 days/week 8:00am to 4:00pm. During peak application periods, this schedule will expand to operate one evening /week until 8:00pm. SDC will further partner with senior centers and community groups for additional outreach services in the area.
- **Service Zone 2:** Currently SDC operates two Energy Home Sites. This includes our administrative site, located in the 53212 zip code (4041 N. Richards Street), and a second site located in the 53209 zip code (6850 N. Teutonia Ave). The operation of EA at these two sites includes a daily schedule Monday-Friday from 7:30 am to 4:30 pm and on Saturdays from 8:00am to 12:00pm. During peak application periods, this schedule will expand to operate one evening /week until 8:00pm.
- **Service Zone 3:** SDC will provide outreach and application services at least one day/ week during peak periods from partnering agencies, including Head Start sites and senior residential sites which are operated by nonprofit organizations, and the Milwaukee Housing Authority. Eligible residents will be able to submit applications through SDC locations in Zone 1, Zone 2, or Zone 6 as well.
- **Service Zone 4:** Partnership with Catholic Charities Adult Day Services (1919 N. 60th Street in zip code 53208) refugee resettlement agencies, and Hmong American Friendship Association (3824 West Vliet Street in zip code 53208), for outreach and application sites at least one day /week during peak periods. Additional outreach at senior sites and Head Start sites.
- **Service Zone 5:** Partnerships with Senior Centers such as the Interfaith for Older Adults at the Wilson Senior Center (2601 W. Howard Avenue in zip code 53221) will include operation of promotion and outreach. Eligible residents in the area will also be able to submit applications through SDC locations in Zone 3 or Zone 6.
- **Service Zone 6:** SDC also operates an Energy Home Site in the 53207 zip code (2968 S. Chase Ave) which is easily accessible to residents who live in the southern municipalities. The operation of EA at this site is equivalent to the operation schedule discussed in Service Zone 2. Services at the Beulah Brinton Center (2555 S. Bay Street in zip code 53207) and the Bay View Community Center (1320 E. Oklahoma Ave in zip code 53207) will also expand outreach and application services with opportunities to apply for EA during peak periods.

In the event that severe weather hits Milwaukee the Energy Assistance program will follow the policy and procedures of SDC. SDC closes its operating facilities when the City of Milwaukee or Milwaukee County announces its decision to close government facilities because of severe weather. Announcements on these closures will be made through media outlets include radio, television, twitter, and on SDC's website. Our decision to close operations is to protect the health and safety of our clients, especially those who depend on public transportation to travel to our sites. In the event of closing, SDC

emergency and on-call staff is available to address crisis situations. Contact is made to assigned staff through Impact 211.

Phone System- SDC Energy Hotline (Call Center)

The EA program at SDC includes the full operation of an EA Hotline (414-906-2800) available to clients through the heating season, October 1- May 15th. The Hotline's number is published on all Energy Assistance informational flyers, press releases, letters to fixed-income clients, and on the SDC website. Our intention is to produce and distribute written materials that include answers to the most likely questions clients have about the Energy Assistance Program. The wide availability of these materials reduces the number of calls we receive on a daily basis, especially during peak periods.

SDC is the only EA provider in Milwaukee County that employs a full time Hotline staff to respond solely to EA inquiries. During regular business hours (7:30am to 5:30pm Monday-Friday), we employ 4 full time Hotline Representatives and a Hotline Coordinator who answer questions, assist clients in making appointments for evening and Saturday time slots, provide clients with information about the status of their application, and respond to complaints (and expressions of gratitude for service). In addition, SDC benefits from the contributions of volunteers who review messages in our voicemail system, identify duplicated messages from the same client, and return calls as needed.⁷ Our operation of the EA Hotline is intentionally designed to respond to a large caller volume, especially during the busiest periods of the EA season. SDC's Energy Hotline manages a large caller volume which is crucial during our peak application periods. During off season periods (Mid-May through August), clients are also able to call the Hotline during regular business hours to connect with Crisis Assistance and other energy related programs including Weatherization and Emergency Furnace. The reduction of calls during this time also leads to a reduction in the number of Hotline Representatives.

SDC has found that most questions regarding EA can be answered through recorded messages about EA business hours, a list of documents need to complete applications, or locations of Service Zone sites. Messages are recorded in English, Spanish, and Hmong through a voice recording tree. Callers may also opt to speak to an operator if they have specific questions, to check the status of a previously submitted application, or to inquire about bus lines to our EA Home Sites. Clients can also opt to leave messages for assistance in our voice mailbox. The Energy Hotline Representatives also respond to inquiries left in voice mail in a timely manner.

Website

The SDC website is a user friendly site that connects clients with information about EA, the location of application sites, information about eligibility that includes household income, proof of residence or property ownership, and composition of household members. The site also includes the telephone numbers of our Energy Hotline, a written list of documents needed to complete an application and confirm eligibility, a list of Service Zones' schedules and locations, copies of the Energy Assistance program flyers (English, Spanish, and Hmong), and an online link to schedule appointments for extended hours in the evening and on Saturdays (see Appendix 7 of website screenshots). SDC's website is found at <http://www.cr-sdc.org/index/Programs--Services/Support-Services/Energy-Assistance.htm>.

⁷ Volunteers respond to common questions left on voicemail. Complex questions are forwarded to full time operators or the Hotline Coordinator.

Marketing Materials

With a focus on maximizing Energy Assistance awareness to potentially eligible clients, SDC designs, distributes, and posts various informational materials throughout Milwaukee County and in collaboration with community partners. The design of all materials is established under WHEAP guidelines through SDC's Community Relations Department. The wide distribution of marketing materials ensures that 100% of eligible clients are aware of the program and understand the steps involved in completing applications or receiving additional energy services such as Weatherization or Emergency Furnace Assistance. Prior to the distribution of any marketing materials, SDC first shares with and receives approval by Milwaukee County, Department of Health and Human Services.

Marketing activities include:

- **Informational Flyers:** Each year the Department of Health & Human Services in Milwaukee County coordinates the updates for Energy Assistance flyers. With input from all EA and Weatherization Assistance providers, the flyer contains basic information about EA, income eligibility guidelines, schedules of operation in each service zone, contact information, and a list of documents to bring. Each year SDC prints and distributes more than 25,000 copies of the flyers among our community partners and places copies at all of our Home Sites. Both printed and electronic versions of these flyers are translated into Spanish and Hmong and are also posted for viewing on the SDC website. Community partners are able to access these electronic copies to print and distribute to their clients as needed. A copy of the 2014-15 WHEAP flyer is attached here as Appendix 8.
- **Letters to Fixed-Income Clients:** SDC supports an early application period for elderly, fixed income households, and home bound clients. The early application period is introduced through letters sent to the previous year clients who fit the criteria of fixed-income households. The list of approximately 18,000 potential clients is identified by the State who then forwards this list to Milwaukee County. The Milwaukee County Energy Workgroup (which includes SDC) then generates and mails informational letters to each household identified. An early application period provides SDC an opportunity to gather applications in mid-August through September by our outreach staff. Applications are officially entered into Home Energy Plus System (HE+) by program staff at the October 1 starting date.
- **Impact 211:** The operation of a 24/7 Hotline by Impact 211 ensures that Milwaukee County Residents have access to information during the off time business hours. Impact makes referrals on behalf of callers who need assistance and is able to contact on-call staff for emergency situations. To ensure that Impact operators have the information they need to make these referrals, SDC updates written descriptions of our programs and summarizes eligibility guidelines.
- **Community Presentations:** Presentations from SDC staff at community centers, community resource events, housing facilities, senior centers, schools, day care centers, and health centers further expand the opportunities we have to increase awareness. During these events residents can find out if they are eligible for EA based on their income, and have an opportunity to ask questions. When appropriate SDC is also able to provide application services at these events.
- **Press Releases:** Written press releases and invitation for media interviews are shared with local broadcasting agencies to send messages about EA schedules and application periods. Media features further bring to the forefront the impact EA makes on the well-being of families who benefit from WHEAP programs and services.
- **Integrated Services Delivery:** As a Community Action Agency, SDC's functional structure connects residents to more than 20 programs, resources, and services that are designed to reduce

poverty and support families as they gain economic stability. When a resident comes to one of SDC's sites to apply for free tax preparation assistance, they may also learn that they are eligible for F.A. During one visit households are able to submit their EA application at the same place they received assistance with their tax forms.

- **Social Media:** SDC's Community Relations Department generates regular information streams through social media sites which include Facebook, and Twitter accounts for both SDC and the Social Development Foundation. Social Media messages bring attention to program promotion, operational schedules, or "interesting to know" snippets.

Table 9. Outcome Summary			
	Activities	Outputs	Outcomes
Location & Operation	<p>Operation of three Home and Satellite Sites in Service Zones 1, 2 and 6.</p> <p>Operation of temporary application sites and outreach with partners during peak periods in Zones 3, 4, and 5.</p>	<p>76,500 low-income Milwaukee County Residents will have access to EA Service Sites</p>	<p>Milwaukee County residents will have easy access to EA service in all 6 Service Zones.</p> <p>Indicator: Number of potential clients who have access to Service Sites in each zone</p>
EA Hotline	<p>Full time operators respond to calls and voice mail messages.</p> <p>Potential clients have access to information via telephone prompts</p>	<p>EA operators receive and respond to an average of 7,000 calls/month</p>	<p>All client inquires will be addressed by Hotline Staff</p> <p>Indicator: Number of calls and voice messages received on EA Hotline</p>
SDC Website	<p>Website includes link to information about EA program, Service Zone schedules, capacity to make appointments, and lists of documents needed for application.</p>	<p>10,000 residents find EA information on SDC website</p>	<p>EA website visitors will find EA link on SDC website</p> <p>Indicator: Number of visits tracked by website link</p>
Marketing	<p>Media marketing, distribution of multilingual flyers, service information provided to Impact 211 and community partners for proper referrals, and special mailings to fixed-income clients.</p>	<p>26,500 flyers distributed through community</p> <p>4,000 clients are referred to EA through Impact 211</p> <p>18,000 letters are sent to fixed income clients</p>	<p>Eligible clients have access to information from community agencies and information flyers and letters.</p> <p>Indicator: Number of flyers and letters distributed.</p>

Application Intake

The operation of EA programs' arrival, intake, and application processes is specific for each Service Zone. The seasonally demanding program challenges the EA staff in its provision of efficient services that benefits nearly 70,000 residents in Milwaukee County. The most demanding periods for service applications include the months of October-November when applications for the heating season are newly opened, and from March through mid-May when the energy winter moratorium has ended and

clients face the threat of disconnection. During these peak periods SDC implements a number of service delivery processes to manage the demand and reduce the stresses related to client overflow. These processes include:

- Early application period for elderly and individuals with disabilities: Prior to the opening of the EA application period on October 1, SDC provides vulnerable clients with an opportunity to complete early applications from mid-August to September 30, which are completed in paper form. This process reduces the crowds of individuals who come to the Service Sites during the first month of EA, and ensures the well-being of fragile residents. On October 1, program staff then enter these paper applications into the HE+ system in chronological order. All of these early applications are entered into HE+ within the required 30-day period (by Oct 30). SDC uses a list of potential applicants that is generated by WE Energies to send an invitation to participate in the early application option. Participants learn about the early application period through an informational letter sent to 18,000 clients.
- Home visits and telephone applications for home bound, fixed-income clients: Under the direction of our Outreach Staff, home bound clients will be able to complete their applications through a home visit or over the phone with an Outreach Processing Specialist. After telephone applications are completed, the applicant receives a Signature Certification document that is signed and dated by the applicant and returned to SDC via postal mail. Upon arrival of the signed document, the responsible Outreach Processing staff member also signs and dates the Certification document and submits the completed application in HE+.
- Extension of operation into evening and weekend hours: During peak application periods, SDC extends its operational hours at our Home Sites to 8:00pm at least one day per week. In addition, a Saturday schedule will also be available to working families. The extension of these operational hours are reserved for working individuals and full time students who are otherwise unavailable during regular working hours. The number of individuals served during these hours is limited and is available on a first come first served basis.
- Opportunities to make an appointment online for working individuals and full time students who are unavailable to come during regular business hours. Online appointments are available to clients during evening and Saturday hours and can be made through an online link on our website or through calling the Energy Hotline.
- Opportunities to complete application via telephone for other fixed-income clients. SDC's Outreach staff helps clients complete these applications through the phone. These staff member also follow up with clients to ensure that a signed Certification document is returned to SDC.

Additional supports for the client intake management include:

- Distribution of service tickets: Clients who come to the Service Sites early in the morning to apply for EA may receive a ticket that ensures they will reach intake and application assistance on that day. Tickets are distributed according to morning and afternoon hours. This means that clients who know that they will not be served until later in the day can return home or attend to other errands instead of waiting at the SDC sites. The distribution of tickets allows SDC staff to monitor the intake demand during peak periods. Once tickets are distributed, clients holding tickets know that their Energy Assistance application will be processed. They know they won't be asked to return another day after waiting for long periods of time. Clients may also avoid this by calling into SDC to ask about wait times prior to coming to a program site.
- Walk-in Applicants: Potential EA clients know that they can arrive at any of the EA sites to process an application. Walk-in clients are welcomed by SDC staff at the entrance of each site

where they will receive additional assistance in applying for EA. However, during peak periods, walk-in clients may learn that they will not be able to secure an appointment for service on that same day. As SDC reaches its maximum capacity, a sign indicating this is placed in full view at the entrance of the site. We also encourage families to call SDC prior to coming to see if there are available spots for application assistance.

- **Energy Assistance Checklist:** A comprehensive list of needed documents, generated by the Wisconsin Department of Administration-Division of Energy, is included as a reference on the SDC website (Appendix 9). When clients use the check list, they may be sure that they are able to show all verifying information that includes photo identification, verification of income, residency, rental information, and social security numbers for all members of the household.

SDC conducts intake for clients on an individual basis. Each site includes a full staff of Intake and Energy Processing Specialists who review eligibility documents and enter applications in the HE+ System. Staff invites each client to a private office cubicle to provide one-on-one assistance in entering all qualifying information into HE+. The program staff has access to an electronic copy of the Wisconsin Home Energy Assistance Program Operations Manual which can be used as a reference to respond to questions and verify processes related to WHEAP. Additional support from Site Supervisors and the Lead Energy Processing Specialist can also serve as a reference for special cases.

To ensure that intake and applications are processed correctly, the Site Supervisor monitors all program staff and makes random reviews of at least 5% of the completed applications. A verification of the completion of the Signature Certification document by both the client and responsible staff is also reviewed.

The program timeline for program applications is summarized in Table 6 below:

Time period	Tasks	Persons Responsible
August 1 – October 1	SDC reviews promotional and informational materials and shares with County for approval.	SDC Marketing Director SDC Energy Assistance Program Manager
	SDC posts EA positions, hires, and trains new staff.	HR Director
	SDC provides refresher training and program updates for returning staff.	EA Program Manager
	Outreach Supervisor trains outreach staff.	Outreach Supervisor
	Milwaukee County generates informational letter for fixed-income residents	EA Program Manager Milwaukee County Staff and WHEAP work group
	SDC begins operations for early applications at Home Sites	EA Program Manager Home Site Supervisors
October 1-November 30	EA intake and application period opens. SDC publishes schedules for each Service Zone. Extended evening and Saturday hours are added	EA Program Manager Site Supervisors
January 1- March 30	SDC continues to provide intake and	EA staff

	application services with an expected reduction of clients	
Late March- May 15	We Energies sends warning letters to utility customers with threat of disconnect as Energy Moratorium period ends on May 15. SDC prepares for increase in client intake for Crisis Assistance.	We Energies EA Staff
On-going	Proactive Crisis Benefits are available to low-income residents pending availability of funds	EA Staff WE Energies

Outreach

As described on page PP-23, the operation of Outreach Activities focuses on our most vulnerable residents, such as the elderly, homebound, and individuals with disabilities. These residents hold a priority status for program marketing and application intake and SDC commits additional resources to maximize the impact of our outreach efforts. Our purpose is to ensure that 100% of all vulnerable clients are aware of the program and understand how to receive these services. SDC demonstrates a capacity in conducting outreach through specified program staff who conduct outreach services. This is led by an Outreach Supervisor and a team of 10 Energy Intake and Application Processors. Table 7 below summarizes the rationale for each of the activities related to Outreach:

Outreach Component	Rationale for Outreach	Who is Responsible
Fixed-Income List Contact <ul style="list-style-type: none"> o Letters to residents in August 	Ensure all fixed-income residents are contacted to remind them of their eligibility for services.	The State provides a list and contact information of fixed-income residents Milwaukee County creates letter which invites resident to apply for EA Hotline Coordinator – Responds to calls regarding information in letter.
Early Application Services	Elderly and residents with disabilities are processed as priority clients. Reduce wait times and ensure safety of vulnerable clients.	Energy Assistance Program Manager- Outreach Intake & Application Processors
Direct Assistance in Application Completion	All clients complete applications through the Energy Assistance Staff. Ensure that clients are able to provide verification documents considered as evidence for eligibility.	Energy Assistance Program Manager Outreach Supervisor
Homebound Clients <ul style="list-style-type: none"> o Home visits o Phone applications 	Homebound clients-identified as those who live in households that do not include able-bodied members. Home visits to assist	Outreach Supervisor Outreach Intake & Application Processors

	clients with applications keep clients safe.	
Persons with Limited English Proficiency	100% of LEP clients learn about the program and are able to complete applications with assistance in their primary language.	Multilingual staff
Multiple Service Zones	Increased marketing to outlying municipalities. Increase the efficiency of staff and maintain manageable costs.	EA Program Manager Community Partners
Visits to Community Centers, Churches, Recreation Centers, and Senior Housing	Provide informational materials and direct services to residents who live in senior centers or who visit community centers. Helps the program staff provide services to elderly and residents with disabilities during the early application period.	Outreach Supervisor Outreach staff Milwaukee Housing Authority Community Partners
Authorized Delegate Agencies	Agencies who also serve vulnerable clients can complete paper applications to prevent sending clients to another location for services.	Delegate Agency SDC Program Manger

Our Outreach activities are further expanded through partnerships with 42 senior residential sites located in Milwaukee County. Senior living complexes include a total 4,611 units in Milwaukee County where low-income or vulnerable residents live. An additional 23 community agencies also coordinate Outreach services within their agencies. A full list of the senior sites and community sites are included in Appendix 2. Applications are processed by SDC Energy Assistance staff or are completed by Delegate Agencies.

The outcomes for application intake are summarized in Table 8 below:

Table 8 Outcomes Summary			
	Activities	Outputs	Outcomes
Application Intake	SDC provides EA in Zones 1, 2, and 6 Monday-Friday 7:30 am to 5:30pm.	Zone 1: 22,500 applications are completed	Low-income residents' energy burden is reduced through EA. Indicator: Total number of Applications entered in HE+.
	SDC extends hours during peak periods one evening/week until 8:00pm and Saturdays 8:00am-12:00pm.	Zone 2: 16,000 applications	
		Zone 3: 5,500 applications	
	SDC partners with community agencies to provide intake services in Zones 3, 4, and 5 during peak periods at least one	Zone 4: 16,500 applications	
		Zone 5: 4,500 applications	
		Zone 6: 5,000 applications	
		Indicators: HE+ reports	

	day/week. Eligible applicants' completed applications are entered in HE+ system by SDC staff	indicate the number of applications submitted	
Outreach	<p>SDC outreach staff provide services to individuals who are homebound, have a disability, or who are elderly on fixed income</p> <p>SDC provides opportunities for early applications starting in mid-August through Sept 30.</p> <p>SDC outreach staff complete application over the phone and make home visits to homebound clients</p>	<p>10,000 elderly or disabled residents complete early applications</p> <p>4000 homebound residents complete applications through home visits or telephone.</p>	<p>Vulnerable residents' energy burden is reduced through EA</p> <p>Indicator: Total number of residents who complete early applications</p> <p>Indicator: Total number of homebound residents who complete applications</p>

Quality Assurance, Auditing and Monitoring

SDC's multiple processes of quality assurance are designed to ensure the energy assistance program and all its components are operated within the program guidelines and requirements. The quality assurance process also safeguards the personal information of all of our clients so that it is protected as confidential information. SDC participates in all facets of quality assurance and provides extensive training to program staff to ensure 100% compliance.

SDC procedures to meet quality assurance requirements include:

- Quality Assurance processes that are designed to ensure that the information entered into the HE+ System is correct and compliant with WHEAP regulations. Site Supervisors monitor the work of Energy Processing Specialists to ensure that income and other eligibility verifications are conducted for every applicant. In order to ensure that all applications are correctly completed and entered into the HE+ system, the EA Lead Energy Processing Specialist and Site Supervisors conduct weekly reviews on a random selection of at least 5% of all applications.
- On-Site Administrative Review: SDC participates in annual county and state Administrative Reviews and site visits. Prior to each scheduled visit, the program staff responds to a set of questions generated by the Division of Energy Services (DES) and compiles case files or other documents for review; Specific files are requested by DES. At each review, the program manager, selected program, indirect staff, and quality assurance staff participate in site visits, interviews, and an initial findings meeting. The EA Program Manager is responsible for any follow-up or revision requests made by the County or the State. The most recent site visit was conducted on March 10-12, 2015. The results of this review are still pending at the time of this writing.
- Annual Audits: An annual agency audit is conducted by an external agency and according to OMB Guidelines. SDC shares our audits with all of our federal funders when requested. In

addition, program monitoring and evaluations are conducted by our funders according to scheduled or unannounced visits. The Wisconsin Community Action Program (WISCAP), whose CSBG funds we used to supplement the EA program, also conducts annual site visits for evaluations. Part of this visit includes a review of federal expenditures.

- Desktop Monitoring: All desktops are accessible through login and passwords that are changed once every 60 days. Inactive screens automatically log off after 15 minutes of inactivity. The SDC policy further requires that staff also lock their systems prior to leaving their work area.
- Furnace Quality Assurance: SDC has a written Quality Assurance Plan for Furnace Repair and Replacement activities. Part of this plan includes bi-annual audits to be conducted by the EA Program Manager on 100% of furnace repair and replacement files.
- Vendor Quality Assurance: SDC conducts competitive bid processes according to federal OMB Standards to generate a list of vendors that can help SDC respond to emergency repair requests. All vendors are checked for CBC, compliance, and industry certifications by our agency's Purchasing Division.
- Personal Identifiable Information (PII): A written Sensitive Data policy provides the descriptions and expectation of the handling client information that includes contact, social security numbers, account numbers and income information. PII documents are stored in locked files and in private (locked) offices. All electronic information is protected by network login and passwords which are operated in compliance with state and federal security requirements.
- Application intake for SDC employees or relatives: SDC EA staff do not process their own applications nor those of family members or friends. In these cases, the EA Program Manager or Site Supervisor conducts intake and HE+ data submissions.
- Applications for current and former SDC Board Members are also completed by the Program Manager or Site Supervisor.
- All direct and indirect Energy Assistance staff are required to review and sign a Conflict of Interest/Non-Disclosure Agreement Form. Signatures on this forms ensures the appropriate behaviors and compliance with confidential information.

Fair Hearings

SDC provides information to clients who wish to request a Fair Hearing if they do not agree with a denial of eligibility or who may want to challenge the amount of EA awarded. In the event of a Fair Hearing request from one of SDC's clients, Teutonia Site Supervisor, with support from the Program Manager provides oversight of the Fair Hearings process with representation assignments delegated to each of the site's Lead Worker.

Customer Complaints

SDC is interested in providing our clients with a seamless application process that demonstrates respect, preserves dignity and ensures that clients receive undivided attention from an Energy Processing Specialist. To reduce complaints, our front-end approach is to ensure that customers understand what to expect when they arrive at one of our program sites. This means that customers are aware of our operating hours, that they know what documents they need to bring to submit a full application, and that they understand how long they may have to wait for services once they arrive.

All SDC clients have access to a *Client Rights and Complaint Procedure* brochure which describes clients civil rights, program service rights, and language rights. The brochure (included here as

Appendix 10) lists complaint procedures and includes grievance contacts. In addition, Energy Assistance customer complaints are prevented or addressed through various methods:

- Ongoing customer service surveys are distributed to all EA clients once they have completed an application. The surveys are then collected by non-energy staff. The Quality Assurance staff then tracks responses to the surveys. See attached QA results from 2013-14 Energy Assistance Surveys (Appendix 11).
- The Energy Hotline and voice mail system is another option for clients to voice complaints regarding their experiences with Energy Assistance.
- Clients also have the option to voice a verbal complaint with a Site Supervisor.

Training

All Energy Assistance staff will participate in pre-season training which will include a review of the EA application process, usage of the HE+ system, DES Intake Training and a review of new program additions, deletions, or changes in operation. On-going staff training takes place at bi-monthly meetings, or as needed, which will also focus on program revisions and address issues, challenges, and quality assurance processes. All program training meetings are conducted by the Energy Assistance Program Manager and Site Supervisors. Site Supervisors will also conduct on-the-spot training when opportunities for learning present themselves, especially those related to intake and eligibility verification.

File Retention

File retention is managed by Energy Assistance Manager and checked by the Quality Assurance program manager. All clients shall have electronic applications entered into the Home Plus (HE + System) by program staff. An electronic copy of the signed and dated certification shall be maintained on file along with additional verification documents (such as Power of Attorney forms) are also saved in clients files as needed. All WHEAP files are maintained for 5 years as directed in the WHEAP Operations Manual. Paper files are stored in a locked storage room with limited access by the Program Manager, Facilities Manager, and the Agency's CEO.

Committee Participation

SDC is a long time provider of EA. The Program Manager and the Site Supervisors are designated representatives for all Committee meetings and activities. Participation in Committee meetings includes the development of Outreach Plans for Milwaukee County, to develop best practices, and to trouble shoot challenges in the program.

Invoicing

The SDC Finance Director is responsible for processing and submitting monthly invoices as described in the WHEAP Operations Manual. An assigned Grant Account works with the Program Manager to review expenditures and ensure that program costs are allowable as directed in the program contract and WHEAP Manual.

Site Representative Policy

Activities at each Services Zone are represented by a Site Supervisors. Site Supervisors are assigned to each service site as requested in the RFP for the WHEAP program. Each of our Home Sites includes a permanent full time Site Supervisor and a Lead Processing Specialist. An additional Outreach

Supervisor is the contact employee for outreach and partnering agencies as described in Service Areas on Pages 9-12 in this narrative.

Table 9 Summary and Outcomes			
	Activities	Outputs	Outcomes
Quality Assurance (QA)	<p>QA Manager monitors EA performance standards.</p> <p>QA staff collect and track customer service surveys.</p> <p>QA staff, Site Supervisors, and EA Program Manager review 5% of all applications for accuracy.</p> <p>QA staff ensures all documents are retained for minimum 5-year retention period.</p>	All of EA program activities are tracked and monitored by SDC's QA staff.	<p>SDC EA program is 100% compliant with program and agency policy and procedures.</p> <p>Indicators: Number of customer service surveys completed</p> <p>Indicator: Total number of applications reviewed for accuracy</p>
Financial Oversight	<p>EA Program Manager completes monthly invoices.</p> <p>SDC Finance Director reviews all expenditures.</p>	All program expenditures are determined to be appropriate and accurate.	<p>100% of all program-related expenditures are allowable.</p> <p>Indicators: Financial reports submitted</p>

Staffing/Personnel

SDC's agency and program staff are qualified professionals who are familiar with all program components, guidelines, and requirements. The staffing plan is generated according to the heating season and includes an increase in hired staff during the highest application periods for regular and crisis assistance schedules.

Item #32 and #33 in this proposal includes a description of SDC's Staffing Plan, position descriptions, resumes of key staff and a preliminary Service Zone operating schedule. A summary of the program's key staff includes:

George P. Hinton, CEO: Mr. Hinton is a strategic executive with extensive experience in leading staff, building teams, improving program outcomes, and providing consultative services. His experience in improving organization performance while establishing a strong culture of engagement and partnerships is a vital characteristic which has established a new direction for the development of a strategic approach in the continual operation of poverty reduction programs at SDC. Mr. Hinton holds an Masters degree in Healthcare Administration, and a Bachelors degree in Finance.

Natasha King, SDC Finance Director: As the agency Finance Director, Ms. King oversees all agency program funding. This includes tracking all granting activities and reviewing allowances as required by current funders. Ms. King oversees a finance staff of 5 including Grant Accountants and Payroll Specialists. Ms. King holds a Masters degree in Accounting and a Bachelors degree in Economics.

Diane Robinson, Energy Assistance Program Manager: With nearly 20 years of experience at SDC, Ms. Robinson provided her management expertise as Energy Assistance Manager. Under the direction of Ms. Robinson, a full scope of WHEAP services will be implemented on behalf of Milwaukee County residents and in partnership with community organizations that are also invested in connecting low-income families to poverty reduction programs. This scope of services include regular benefits, crisis assistance, case management, and outreach services. Ms. Robinson holds a Bachelors degree in Human Services Management with graduate certificates in Human Resources and Project Management.

Delisa Craft, EA Site Supervisor: Ms. Craft is responsible for the operation of services at SDC's Richards Street Home Site. Ms. Craft holds a Bachelors degree in Business Management and has worked at SDC as an Energy Assistance employee since 1997.

Evelin Franco, EA Site Supervisor: Ms. Franco is responsible for the operation of services at SDC's Chase Street Home Site, an English/Spanish language site. Ms. Franco has worked at SDC Energy Assistance since 2005.

Vacant, Outreach Supervisor: The Outreach Supervisor is responsible for outreach services including promotion, home visits, and telephone applications. The Outreach Supervisor will also oversee the scheduling and management of community partners who also serve elderly and clients with disabilities. The Outreach Supervisor will have a minimum Associates Degree in Human Services or related field and five (5) years of supervisory experience or related experience.

Vacant, Hotline Coordinator: The Hotline Coordinator oversees the day to day operations of the Energy Hotline. Responsible for the management of Hotline Representatives and volunteers including answering all incoming energy calls, greeting callers, and resolving issues by contacting appropriate person to assist client's needs. The Hotline Coordinator will have a minimum Associate Degree and five (5) years related experience, working in call center and/or in customer service or administrative support.

	Activities	Outputs	Outcomes
Staffing and Personnel	SDC operates a full scope of EA activities with trained staff	49 permanent and temporary staff are hired to operate EA activities <ul style="list-style-type: none"> • 1 EA Program Manager • 1 Energy Assistant • 3 Site Supervisors • 1 Outreach Supervisor and 7 Outreach staff • 5 Case Managers • 1 Case Manager Assistant • 1 Hotline Coordinator and 4 Hotline operators • 3 Lead Processing Specialists • 20 Outreach EA Intake 	SDC's qualified staff to provides a full scope of EA services to Milwaukee County residents. Indicator: Number of qualified staff listed on a full roster for EA activities

		& Processing Specialists • 3 Receptionists/ Screener	
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Human Resources

SDC operates a fully staffed Human Resources (HR) department which is managed under the direction of Human Resources Director, Pamela Biagui. Ms. Biagui's experience of over ten (10) years in consultant and Human Resources management includes experiences in both nonprofit and corporate environments. Ms. Biagui and her staff works with the EA Program Manager to post the availability of EA positions and conducts full interviews on qualified applicants. The HR staff further conducts background checks, CBC reviews (according to the Wisconsin Caregiver Law), and offers a position of employment to selected applicants who meet the criteria for hire. A confidential file on each SDC employee is maintained in locked files in the HR department and are updated as needed. Updated files include information on all renewal background checks, annual performance reviews, and reports of convictions or arrests that are self-reported by staff. An electronic copy of SDC's Personnel Policy and Procedure Manual is provided to all SDC staff and includes descriptive information on both agency policy and federal compliance policies in an easy to read format.

Table 11 Outcomes Summary			
	Activities	Outputs	Outcomes
Human Resources	SDC HR department oversees staff hire and ensures that all personnel requirements are met.	Direct and indirect staff have updated files	100% of all EA staff files are up-to-date and include copies of required documents. Indicator: staff files and background checks are stored in HR for minimum 5-year period.

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.

SDS Program Description October 1, 2013- September 30, 2014						
Program Name	Funding period	Funder	Program volume	Target Population	Dollar amount	Service Mix
Energy Assistance	Oct 1 2013- Sept 30, 2014	Milwaukee County Dept. of Health and Human Services supplemented by Community Service Block Grant (CSBG) WE Energies (Public Benefits)	49,104	Low-income Milwaukee County Residents	\$1,587,797 \$225,000	Energy Assistance Proactive-Crisis Services Referrals to supportive services
Energy Assistance Hotline	October 1, 2013- Sept 30, 2014	Milwaukee County supplemented by Community Service Block Grant (CSBG)	76,960	Low-income Milwaukee County Residents		Energy Assistance Hotline and Voicemail Messages. Recorded information for EA FAQs.
Furnace – Replacement Repair	October 1 2013 - Sept 30 2014	WHEAP Wisconsin Department of Administration	607 referrals housing units 578 units received repairs or replacements	Low-income homeowners	\$415,137	Energy Assistance Furnace Repair/Replacements
Weatherization Assistance	July 1, 2013- June 30, 2014	Wisconsin Dept of Administration	750 housing units rehabbed	Low-income homeowners and renters	\$5,567,000 WX	• Weatherization Assistance

2015 PROVIDER SERVICE SITE INFORMATION

ITEM #30

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

Agency Name: SDC	Site Name: Richards Street
Site Address: 4041 N. Richards	City/State/Zip: Milwaukee WI 53212
Site Contact Person: Diane Robinson	Title: EA Program Manager
Phone: 414-906-2804	Email: drobinson@cr-sdc.org
Fax: 414-906-2719	

Describe differences in programs or services available at this site: The Richards Street Home Site houses various programs that include: Energy Assistance, Emergency Crisis Assistance, Pro-active Assistance, Energy Assistance Hotline, Outreach, Case Management Services, Emergency Furnace, Weatherization Assistance, Lead Hazard Reduction, Neighborhood Improvement Project, Volunteer Income Tax Assistance, Adult Education, Financial Capability, Wellness Clinic, AOTA counseling, Family Strengthening, Career Enhancement and Employment Services, Business Services, Senior Companions, Prescription Advocacy & Referral Services, and Health Services.

Total number of unduplicated consumers you are presently able to serve at any one time: 240/day

Total number of unduplicated consumers you are currently serving: 15,560 in Energy Assistance

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

- Monday: 7:30am to 5:30 pm
- Tuesday: 7:30 am to 5:30 pm
- Wednesday: 7:30 am to 5:30pm extended to 8:00pm during Peak Periods
- Thursday: 7:30am to 5:30pm
- Friday: 7:30am to 5:30pm
- Saturday: 8:00am to 3:00pm
- Sunday:

Emergency contact available 24 hours Emergency number 906-2800 or Impact 211

Agency owns this Service Site

Agency leases this Service Site

Expiration date of Lease: December 31, 2015
(lease must extend through the end of the contract year, at minimum)
SDC is seeking new Home Site for January 2016 move.

Item 30 Service Site Certification:

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

Signed:  _____

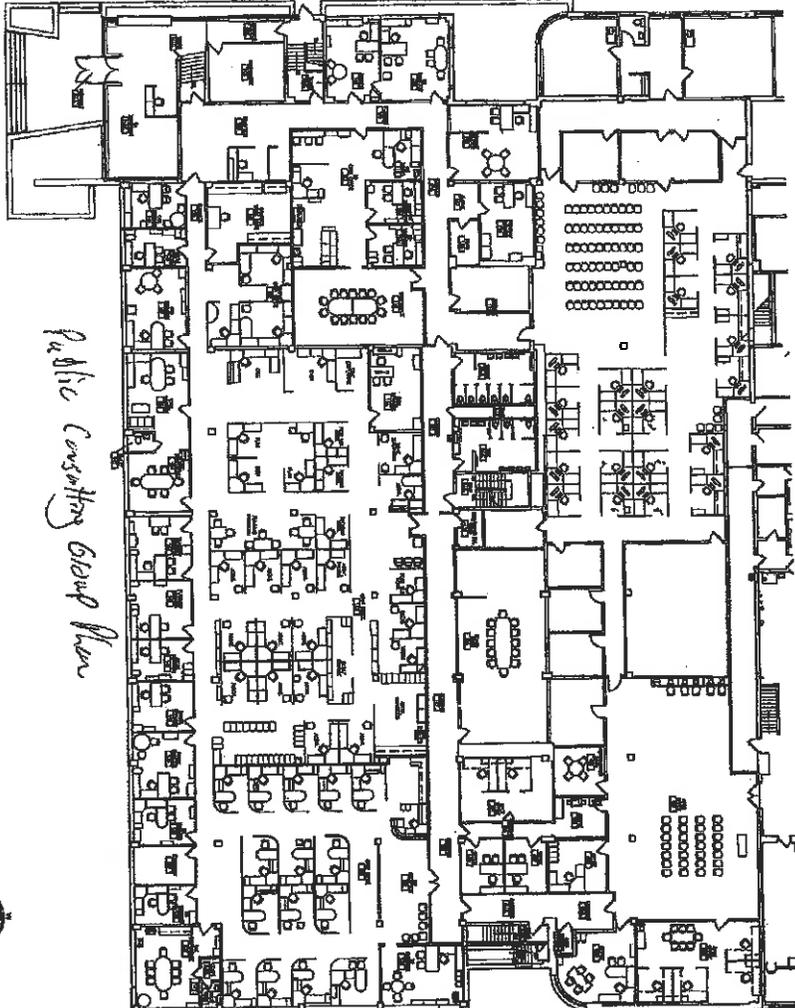
Name (print) Gerard Randall

Title Board Chair

Phone 414-906-2721

Email afortson@cr-sdc.org

Quorum Architects, Inc.
 3123 West Highland Boulevard
 Milwaukee, Wisconsin 53208
 Phone: 414.255.9795
 Fax: 414.255.5495
 www.quorumarchitects.com



Public Consulting Group Plan

1 PARTIAL FIRST FLOOR PLAN
 SCALE: 1/32"=1'-0"



**PRELIMINARY
 NOT FOR
 CONSTRUCTION**
QUORUM ARCHITECTS, INC.

DATE: 03/14/2011	REVISION:	PROJECT: SOCIAL DEVELOPMENT COMMISSION 4041 RICHARDS STREET MILWAUKEE, WI 53211	PROJECT NO. 01048.06
SHEET REF: EC1.1	DRAWN: OSH		DRAWING: EC1.1

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2015 PROVIDER SERVICE SITE INFORMATION

ITEM #30

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

Agency Name: SDC	Site Name: Chase Site
Site Address: 2968 S. Chase Street	City/State/Zip: Milwaukee WI
Site Contact Person: Evelyn Franco	Title: EA Site Supervisor
Phone: 414-906-2817	Email: efranco@cr-sdc.org
Fax: 414-906-2719	

Describe differences in programs or services available at this site:

The Chase Avenue Home Site houses: Energy Assistance, Emergency Crisis Assistance, Pro-active Assistance, Outreach, Case Management Services, and Volunteer Income Tax Assistance,

Total number of unduplicated consumers you are presently able to serve at any one time: 140 /day

Total number of unduplicated consumers you are currently serving: 13,623 in EA

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

- Monday: 7:30am to 5:30 pm
- Tuesday: 7:30 am to 5:30 pm
- Wednesday: 7:30 am to 5:30pm extended to 8:00pm during Peak Periods
- Thursday: 7:30am to 5:30pm
- Friday: 7:30am to 5:30pm
- Saturday: 8:00am to 12:00pm
- Sunday:

Emergency contact available 24 hours Emergency number 906-2800 or Impact 211

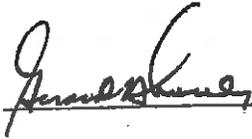
Agency owns this Service Site

Agency leases this Service Site

Expiration date of Lease: September 30, 2019
(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:  _____

Name (print) Gerard Randall

Title Board Chair

Phone 414-906-2721

Email afortson@cr-sdc.org

2015 PROVIDER SERVICE SITE INFORMATION

ITEM #30

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

Agency Name: SDC	Site Name: Teutonia Site
Site Address: 6858 N. Teutonia Ave	City/State/Zip: Milwaukee WI 53209
Site Contact Person: Terry Watson	Title: EA Site Supervisor
Phone: 414-906-2700 X 4616	Email: twatson@cr-sdc.org
Fax: 414-906-2719	

Describe differences in programs or services available at this site:

The Teutonia Home Site houses: Nutrition Services, Energy Assistance, Emergency Crisis Assistance, Pro-active Assistance, Outreach, Case Management Services, and Volunteer Income Tax Assistance,

Total number of unduplicated consumers you are presently able to serve at any one time: 140/day

Total number of unduplicated consumers you are currently serving: 19,921 in EA

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

- Monday: 7:30am to 5:30 pm
- Tuesday: 7:30 am to 5:30 pm
- Wednesday: 7:30 am to 5:30pm extended to 8:00pm during Peak Periods
- Thursday: 7:30am to 5:30pm
- Friday: 7:30am to 5:30pm
- Saturday: 8:00am to 12:00pm
- Sunday:

Emergency contact available 24 hours Emergency number 906-2800 or Impact 211

Agency owns this Service Site

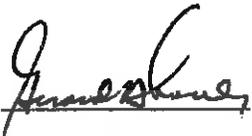
Agency leases this Service Site

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

Item 30 Service Site Certification:



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

Signed:  _____

Name (print) Gerard Randall

Title Board Chair

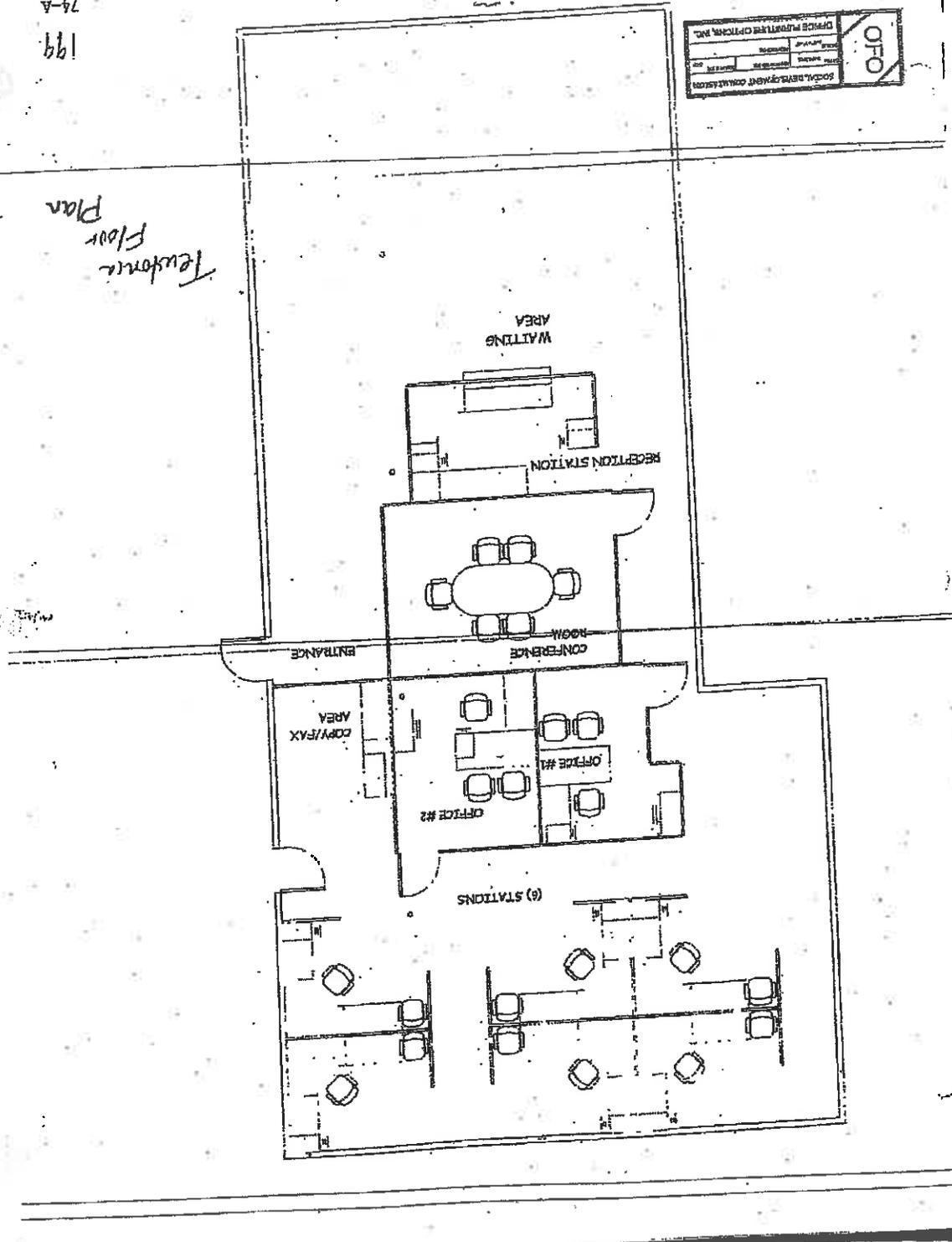
Phone 414-906-2721

Email afortson@cr-sdc.org

74-A
199

Teusonia
Floor
Plan

OFFICE MANAGEMENT SYSTEMS, INC.	
DATE:	
BY:	
FOR:	
SOCIAL REVENUE MANAGEMENT CONSULTANTS	



PROGRAM ACCESSIBILITY

ITEM # 31

What is your agency's plan to serve clients:

With physical disabilities

All of SDC service sites and buildings are accessible for those who have limited physical mobility, and are compliant with federal requirements that are responsive to accessibility and safety. To ensure that all eligible residents have access to program intake and application processes, the staff will work to support all clients with limited mobility.

- Accessibility at the Richards Street site: A handicapped entrance (with a wheelchair ramp) is located directly from the surface parking lot located on the south side of the building. Clients have access to separate office, where staff can meet them, located near the entrance lobby. All restrooms include handicapped accessible stalls.
- Accessibility at the Chase Site. The entrance to the chase site is level to the street and side walk. All restrooms include handicap accessible stalls.
- Accessibility at the Teutonia Site also includes a wheel chair ramp, accessible entrance, and accessible restrooms.
- In working with community partners, SDC requires ADA accessibility compliance for building entrances, parking with handicap parking spots, restroom access, and close proximity to Milwaukee County Transit stops.

With developmental disabilities

SDC employs Case Management staff who is able to provide evidence of appropriate credentials for serving clients with special needs, including developmental disabilities. Case Managers are required to have a minimum of a B.A. in a social services or human service related area.

With hearing impairment

SDC is able to contact Interpreting Solutions, Inc., a video relay program.

With visual impairment

Staff are available for leading clients to the facilities to ensure their safety. SDC Staff read aloud program materials, applications, and informational flyers, and also publishes large print materials for client use.

Who are non- English speaking or have limited English proficiency

SDC has a written Program Translation and Interpretation Procedures guide that is utilized in all of SDC programming. This guide reflects federal requirements that agencies who are providers of federal services and programs address the rights of Limited English Proficiency (LEP) clients. Spanish speaking employees are also placed at our Chase Home Site which serves a large population of Spanish speaking residents. In addition, a partnering relationship with Refugee Resettlement agencies (Catholic Charities, Lutheran Social Services, Pan African Community Association, International Institute of Wisconsin) in Milwaukee provide LEP residents with assistance. SDC Human Resources also maintains a list of employees who are fluent in Spanish, and Hmong as well. The list of multilingual staff members is updated every six months to ensure program staff is able to identify those staff members who may be able to assist in translation services.

Who require personal care assistance

This is non-applicable for this program application.

List any other services enhancing program access, e.g. agency located near public transportation, etc. All of SDC's programs are operated at sites that are located within easy access to public transportation.

STAFFING PLAN

ITEM # 32

Describe the staffing plan and its relationship to the volume of clients or services to be provided. Describe in terms of staff to client ratios, client volume or case load per staff, or how many staff are needed to perform a particular activity. Any program with the potential to require 24-hour coverage must submit a detailed description of how, by staff position, coverage will be provided.

Agencies providing services at more than one site must include a description of the staffing pattern for each site, if different. If the staffing pattern is the same for each site, include a statement to that effect.

SDC's staffing plan has been revised to address Milwaukee County's new structure to provide Energy Assistance to Milwaukee County residents who live in 6 Service Zones. Under this new structure SDC is prepared to provide services at:

- Three Home Sites where a full scope of services will be provided. This includes Energy Assistance, Crisis Assistance, and Outreach Services. A daily schedule at our Home Sites will include operation from 7:30am to 5:30pm with at least one evening/week until 8:00pm, and Saturday services from 8:00am to 12:00pm. One of SDC's current Home Sites, located in Zone 2 will be moving to a new facility in January 2016. This move is likely to relocate in Service Zone 1.
- Satellite sites in collaboration with community partners including Senior Centers, Senior Housing facilities, community-based organizations, churches, Head Start and child care centers, and health centers. These sites will provide promotion and Outreach Services, and a set schedule of application intake opportunities for at least one day a week. Satellite sites will be located in Service Zones 1, 3, 4, 5 and 6. All program activities in our Satellite sites will be completed by an Outreach Staff.

In addition, SDC partners with Delegate Agencies who are qualified to provide Intake Services, verify eligibility, and complete paper applications on behalf of clients they serve. Completed applications are then forwarded to SDC Home Sites where staff enter the information in the Home Energy Plus (HE+) database. Delegate agency staff are required to have all CBC back ground checks completed. They are also required to submit a signed "Conflict of Interest/Non-Disclosure Agreement Form.

All program activities are operated under the direction of Ms. Diane Robinson, the Energy Assistance Program Manager. Under her direction, the following staff will provide a full scope of services to all Service Zones. The staff composition will include:

- EA Program Manager
- EA Program Assistant
- EA staff at Home Site Richards Street- process up to 240 applications/day
 - One (1) Site Supervisor
 - One (1) Intake Specialist/Screeener
 - One (1) Lead Processing Specialist
 - Eight (8) Processing Specialists
 - One (1) Energy Hotline Coordinator
 - Four (4) Energy Hotline Operators
 - One (1) Case Manager Assistant
 - Three (5) Case Managers

- EA staff at Home Site Chase Street- Process up to 140 applications/day
 - One (1) Site Supervisor
 - One (1) Intake Specialist/Screenener
 - One (1) Lead Processing Specialist
 - Six (6) Processing Specialists
- EA staff at Home Site Teutonia Avenue- Process up to 140 applications/day
 - One (1) Site Supervisor
 - One (1) Intake Specialist/Screenener
 - One (1) Lead Processing Specialist
 - Six (6) Processing Specialists
- EA Outreach Staff who will provide home visits, telephone application services, and application processing services at our Satellite sites. Process up to 63 applications/day
 - One (1) Outreach Supervisor
 - Seven (7) Processing Specialists

Staff to Client Ratios

Each of the Processing Specialists will be expected to process four (4) applications/hour through a one-on-one methodology. This means that clients will first be screened for eligibility by an Intake Specialist. Then a Processing Specialist to work with clients one-on-one, to enter the application information in HE+. Clients and the responsible staff member then sign the certification page.

Due to the needed time investment for home visits, the client ratio for outreach staff is lower with an expectation for each staff to visit at least 9 clients/day through visits or telephone applications. In addition, the outreach staff will be scheduled to attend special events at our satellite sites. During these periods, staff will process four (4) applications/hour.

Resumes for key staff are attached :

- Diane Robinson, EA Program Manager
- Delisa Craft, Site Supervisor for Home Site Richards
- Evelin Franco Site Supervisor for Home Site Chase
- Site Supervisor for Home Site Teutonia is currently vacant
- Outreach Supervisor is currently vacant
- George Hinton, SDC CEO
- Natasha King, SDC Finance Director
- Pamela Biagui, SDC Human Resources Director

Position Descriptions are included:

- EA Program Manager
- Site Supervisor
- Outreach- Energy Processing Specialist
- Hotline Coordinator
- Hotline Representative
- Intake Specialist/Screenener
- Case Manager
- Lead Processing Specialist
- Processing Specialist

Staffing Plan for 2015-16

Status	Last Name	Current Position	Oper	Outreach	Crisis	UP	Oct	Nov	Dec	Jan 16'	Feb	March	April	May	June	July	Aug	Sept	Total
Full Time-Year Round (YR)	Benson	Case Manager	0%	5%	20%	75%	176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time-YR	Johkins	Case Manager	0%	5%	20%	75%	176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time-YR	Vacant	Case Manager	10%	30%	60%		176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time-YR	Vacant	Case Manager	10%	30%	60%		176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time-YR	Vang	Case Manager	0%	5%	20%	75%	176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time-YR	Jones	Case Manager Asst	10%	10%	30%	50%	176	168	184	168	160	176	176	168	176	184	168	176	2080
Full Time	Barber	Energy Processing Specialist (EPS)	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Barnes	EPS	40%	30%	30%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Cazaes	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Coleman	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Cordova	EPS	40%	30%	30%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Devila	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Green	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Lomas	EPS	40%	20%	40%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Mallet	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Orlando	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Perrea	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Sanchez	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Stevens	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Torres	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Trenton	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vang	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	EPS	40%		60%		176	168	184	168	160	176	176	168	0	0	84	176	1636

Full Time	Vacant	Hotline Coordinator	10%	60%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Azcueza	Hotline Rep	30%	30%	40%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Green	Hotline Rep	10%	60%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Lopez	Hotline Rep	10%	60%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Schnell	Hotline Rep	10%	60%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time-YR	Burkett	Lead Processing Specialist	30%	20%	50%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Ellis	Lead Processing Specialist	30%	20%	50%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Mobon	Lead Processing Specialist	30%	20%	50%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Vacant	Outreach Supervisor	10%	70%	20%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time	Vacant	Outreach-EPS		70%	30%		176	168	184	160	176	176	168	0	0	84	176	1636
Full Time-YR	Clayton	Program Assistant	40%	30%	30%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Robinson	Program Manager	35%	20%	30%	15%	176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Harris	Receptionist/Intake Specialist	60%		30%	20%	176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Miller	Receptionist/Intake Specialist	60%		40%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Watson	Receptionist/Intake Specialist	60%		20%	20%	176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Craft	Site Supervisor	50%	20%	30%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Franco	Site Supervisor	50%	20%	30%		176	168	184	160	176	176	168	176	184	168	176	2080
Full Time-YR	Vacant	Site Supervisor	50%	20%	30%		176	168	184	160	176	176	168	176	184	168	176	2080

DIANE ROBINSON
Milwaukee, Wisconsin 53218

BACKGROUND SUMMARY

Highly motivated, reliable, results-oriented professional with well developed interpersonal, organizational and leadership skills. Strong emphasis on Administration, Program Development, Accounting, Treasury Management Operations, Customer Service, Billing, Purchasing, Accounts Payable and Accounts Receivables.

CORE STRENGTHS

Project Management	Accounts Payable
Organizational Development & Management	Accounting/Finance (Corporate and Non-Profit)
Operations	Tax preparation
Contract Management	Customer Relations
Case Management	Record Retention
Human Resources	Marketing & Fund Development
MS Office, Visio and Publisher	Program Development
Donor Management-Raisers Edge	Strong Communications
Special Event Production	Website-Content Management
Database Administrator	Purchasing

EMPLOYMENT HISTORY

COMMUNITY RELATIONS-SOCIAL DEVELOPMENT COMMISSION 4/99 to Current
A Community Action Agency which administers more than 30 low-income programs (\$58M) which are funded by Federal, State, Local agencies, various foundations and private donors. Programs are designed to minimize or eliminate barriers that prevent families from obtaining self-sufficiency while promoting economic empowerment.

Program Manager – Energy Assistance 11/14 to Current

Position's responsible for the overall management and coordination of the Energy Assistance Program. Responsibilities includes but not limited to program development, management of program budgets, workflow procedures and site determination. As liaison between programs, utilities, state, county and city departments, work to develop and coordinate activities designed to address the utility needs of the low income Milwaukee community.

Community Relations Manager 10/06 to 11/14

Primary responsibilities include the oversight of agency-wide community outreach, marketing & communications, Website & Insider content management and design, and Volunteer recruitment and management. Additional responsible area includes development and implementation of all branding standards, develop units operating procedure manual, work with Board of Commissioner to produce Board events, research fundraising programs to make recommendations to the SD Foundation Board of Directors to successfully achieve fundraising goals; identify new funding opportunities; strengthen donor relationships and stewardship; Database Administrator for the Raiser's Edge database. Develop, coordinate, implement and evaluate special events and projects as well as community relations to heighten awareness of poverty issues. Coordinate the acknowledgement of agency-wide contributions.

Accomplishments include but not limited to;

- Fully implemented infrastructure of Constituent Management System upgrade from Etapestry to Blackbaud Raiser's Edge®
- Developed Community Relations Policy & Procedure Manual

DIANE ROBINSON

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- Successfully developed key agency partnerships

Adult Services Team Manager

7/05 to 10/06

Position's responsible for overseeing and developing Managers of various programs. Primary responsibilities included the administration and the coordination of day-to-day activities of the Energy Assistance, Education & Training, Milwaukee Asset Building Coalition (MABC), Volunteer Income Tax Assistance (VITA), Skills Enhancement and Ways to Work programs. Coordinate the activities of the community wide coalition that focuses on increasing Milwaukee County residents' net worth; the development and improvement of departmental, organizational and systems structure, and the creation of financial supportive systems.

Program Manager – Energy Assistance

4/04 to 7/05

Position's responsible for the overall management and coordination of the Energy Assistance Program. Responsibilities include the development and monitoring of program budgets, workflow procedures and site determination. As liaison between programs, utilities, state, county and city departments, developed and coordinated activities designed to address the utility needs of the low income community. Designed and implemented integrated service delivery infrastructure for program. Performed state and local presentations of best practices for program administration.

Processing Supervisor -- Energy Assistance

5/01 to 4/04

Hire, Train and Supervise work of Case Management, Lead Processing Specialist, Processing Specialist, Receptionist and Screeners. Monitor day to day operation of the Energy Assistance Program ensuring that the rules and regulations of the program are carried out. Coordinate activity at all Outreach Sites, Home/Phone visits to the elderly and disabled, Crisis Proactive Services, Keep Wisconsin Warm, and the administration of the Emergency Furnace Repair and Replacement program.

Accomplishments include but not limited to;

- Strengthened working relationship with partners (WE Energies, Milwaukee County, Department of Administration, Etc.)
- Increased and Improved Service Delivery
- Developed discretionary pool of funds to cover normal operating expenses not covered by grant funding

Supervisor – Accounts Payable

4/99 to 5/01

Oversee Accounts Payable processing of receivers, purchase orders and check requests. Process includes the matching of invoices with receivers and purchase orders ensuring timely payment to vendors. Daily audit and perform reconciliation of employee travel expense reports. Conduct past due follow-ups on outstanding checks and travel advances.

Accomplishments include but not limited to;

- Developed workflow procedures and trained staff on processing payments more timely.
- Researched, developed and implemented policy guidelines for Accounts Payable and Travel.
- Trained staff on fully utilizing the processing system to obtain maximum efficiency.
- Implemented CD Rom use to reduce/eliminate cancelled check retention.
- Installation and setup of the laser check printing.
- Various program/department allocations for all telephone and space.
- Produced and Monitored the Facilities/Operations budget
- Fixed Assets and 1099 Processing

ACCOUNTANTS ON-CALL

1/99 TO 3/99

DIANE ROBINSON

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Temporary Employment assignments with various employers in the area of Accounts Payable, General Accounting and Budget Processing.

HIGHLANDS INSURANCE GROUP
(Formerly NORTHWESTERN NATIONAL INSURANCE GROUP), Milwaukee, WI
Property & Casualty Insurer. (Asset size: \$2,366,656,000)

1979 to 1998

Supervisor - Treasury

7/82 to 7/98

Manage the treasury functions that include: Accounts Payable; generation of various disbursement checks (general expenses, travel expenses, return premiums, direct bill commissions, paid losses and contingent commissions) reconciliation and reporting of premium receivables; entry of all financial accounting data into the financial disbursement and general ledger system; produce cash schedules for each legal entities financial statements; unclaimed property reporting and reconciliation; use tax tracking and reporting; inter-company allocation entries, reconciliation and settlement; cash management, including cash flow forecasting, determination of daily cash position and initializing wire transfers and ACHs via a link service; reconciliation of 65 corporate bank accounts (8 legal entities); coordination of bank account setup, maintenance and relations; claim accounting processing and reconciliation. Provide management reports with regard to the status of inter-company balances, cash inflows and outflows (receipts and disbursements).

- Developed Disaster Recovery Plan for Treasury Department
- Implemented internal control safeguards and procedures for all disbursement processing systems.
- Researched, developed and implemented policy guidelines for Accounts Payable and Travel.
- Implemented CD Rom use to reduce/eliminate cancelled check retention.
- Implemented business decisions affecting treasury functions, such as the automation of payables, installation and setup of the laser check printer and agency claim draft processing procedures for field adjusters.
- Developed workflow procedures and trained staff on new general ledger and disbursement systems (expenses, claims, commissions and premium refunds).
- Actively participated in the decision-making process affecting Integrated Platform disbursement systems, including CHS, PMS/HOS, TFG, and IMIS.
- Coordinated and implemented the Raleigh Finance transfer to Brookfield.
- Coordinated the successful transfer of the Treasury operations to Houston.

EDUCATION AND TRAINING

BS-HSM (Cardinal Stritch), Certificate of Project Management (Cardinal Stritch), Certificate of Human Resources, Case Management I (UWM), Spanish for Social Services (UWM), Balanced Score Card, Wisconsin Home Energy Assistance Program (WHEAP), VITA, Mortgage Loan Processing, Various Accounting Software, Treasury Management, Time Management Training, The Secrets of Successful Women Supervisors, Leadership and Communication Workshops, Frontline Leadership and Communication W/S, Presentation Skills, Problem Solving, Lincoln Junior/Senior High School.

PROFESSIONAL AFFILIATIONS, BOARDS AND SPECIAL INTERESTS

- Association of Fundraising Professionals
- National Association of Professional Women
- Board Member-GNB Community Development Corporation
- Board Member-New Concept Self Development
- Board Member-President Elect-Milwaukee Lincoln High School Alumni Association, LLC
- MFI Executive Advisory Committee Member
- Business Model Development for Diamond Lanes, A subsidiary of Greater New Birth Church
- Woman to Woman Sorority

DIANE ROBINSON

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Delisa S. Craft

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Milwaukee, Wisconsin 53212
(414) 906-2700
dcraft@cr-sdc.org

OBJECTIVE

Seeking a challenging career with a progressive organization that will utilize my skills, abilities, and trainings that I have learned from management, classroom instruction, operations, and also through my years of servicing Milwaukee County residents.

EXPERIENCE

2009-Present	Social Development Commission	Milwaukee, WI
	<i>Energy Site Supervisor /VITA Program Supervisor</i>	
	<ul style="list-style-type: none">• Supervise over 35 staff (hiring, training, coaching and developing performance standards and measures)• Monitor daily activity to ensure that all procedures and regulations are being followed. Review applications randomly on a weekly basis to identify and coordinate the correction of errors.• Ensure assigned tax preparers are providing excellent customer service to all clients. Coach staff on improvements to service delivery.• Develop and maintain schedules for volunteers and employees to work at sites and ensure adequate tax preparation and quality review coverage.• Prepare monthly reports outlining program activity for distribution.• Assist in development and monitoring of the program budget.	
1997-2009	Social Development Commission	Milwaukee, WI
	<i>Lead Processing Specialist/Energy Processing Specialist/Intake Specialist/Monitor</i>	
	<ul style="list-style-type: none">• Completing referrals for clients, to assist with budgeting, weatherization and other agency programs.• Preparing crisis payments for various Milwaukee County residents.• Communicating with fuel oil, gas, and electric vendors.• Monitoring regular and emergency energy applications• Utilizing the CARES system.• Documentation completed by case notes.• Confidentiality of all clients' information.• Train staff.	

EDUCATION

2005-2010	University of Phoenix	Brookfield, WI
<i>Student</i>	<ul style="list-style-type: none">◦ Studying in the field of Business Manager-Bachelor Degree Program.	
1993-1995	Harry S. Truman	Chicago, IL
<i>Student</i>	<ul style="list-style-type: none">◦ Studying Psychology	

VOLUNTEER

2008-Present	Hartford University	Milwaukee, WI
2001-2007	Dr. Martin Luther King Elementary School	Milwaukee, WI
2003-2004	Sistaz Girlz	Milwaukee, WI

Evelin Franco

Milwaukee, WI 53204

PROFESSIONAL EXPERIENCE

October 05-Present **Community Relations-Social Development Commission**

Program Supervisor

- Supervise staff (hiring, training, coaching and developing performance standards and measures).
Monitor daily activity to ensure that all procedures and regulations are being followed. Review applications randomly on a weekly basis to identify and coordinate the correction of errors.
Analysis of staff activity to ensure proper salary allocations between Administrative, Outreach, and Crisis Supportive Services
Attend monthly planning meetings with Milwaukee County Strategic Planning Group to assist in the exchange of information, review program updates, and develop programs to address and reduce the energy burdens that plague the low income community.
- Resolve customer complaints by analyzing the situation, informing and or enforcing energy program policies.
Document complaints involving workers and take appropriate action with staff.
- Coordinate outreach activity with other community based organizations and Senior Citizen sites ensuring all communities are served.
- Coordinate site schedules to ensure adequate staffing at each location.
Assign Home/Phone visit requests ensuring that the homebound and the elderly households are properly serviced.
Monitor and address crisis issues reported on the afterhours crisis line.
- Keep up to date with the rules and regulations of the energy program to answer questions of workers and clients and make informed decisions regarding the energy applications process and client eligibility.
- Facilitate training sessions of staff, authorized representatives and site personnel on program changes.
- Monitor Cap60 and CARES data bases to ensure accuracy
- Agency- wide responsibility for SAVE system
- Verify information and post payments to Agency Solutions at WE Energies
- Administer KWWF and Heat for Heroes funds
- Assist in the development and monitoring of the program budget.
- Assist in the development of informational material for the program.
- Prepare monthly reports outlining program activity for distribution.

Lead Energy Processing Specialist

- Provide technical assistance to processing specialists
- Solve complex issues as related to Energy Assistance Program
- Ensure excellent customer service by assigned specialists through motivating staff and coaching on improvements
- Act as source of technical information for staff
- Represent Agency at County "Fair Hearing" meetings
- Ensure referrals to Case Management Unit are handled correctly
- Maintain records and reports
- Try to resolve customer complaint-act as first point of contact
- Ensure smooth client flow on daily basis

Energy Processing Specialist

- Conduct client interviews
- Assist clients with application process
- Verify client information with outside agencies
- Review, secure and verify data
- Enter information on case records using state computer system
- Maintain daily records and reports
- Translating and interpreting Spanish/English

May 2000-June 2005

Aurora Health Care, Inc.

Coding Abstractor

- Responsible for abstraction of physician services, assigning accurate codes for procedures
- Facilitated the accurate submission of claims to insurance carriers
- Reviewed medical files to include progress notes and diagnostic reports
- Effectively interacted with physicians when discrepancies occurred

May 1995-May 2000

Billing Clerk Specialist/Charge Entry

- Registered patients and guarantor demographics with current insurance
- Responsible for accurate keying of charge documents; Audited all coding and returns to coder
- Coordinated benefits appropriately and determined the reassignment of claims
- Made adjustments to accounts forwarded from Follow up

June 1992-May 1995 **Prime Care**

Claims Data Entry

- Knowledge of HMO/IPA policies and procedures
- Investigated pending reports
- Met accuracy standards of 98%

Claims Assistant

- Reviewed claims to ensure complete and accurate
- Returned claims to providers needing additional information
- Promoted after 4 months to Claims Data Entry

January 1989-January 1994

Sixteenth Street Community Health Center

Receptionist/Patient Registrar

- Executed diverse office duties including computer registration of new patients, updated established patients, data entry of charges for services provided
- Informed patients of fees, co-payments, and balances, while collecting and posting on-site payments
- Coordinated appointment scheduling for different medical procedures and office type visits
- Trained and supervised new personnel on switchboard, reception, and registration desks
- Provided Spanish/English translation as needed

SPECIALIZED TRAINING AND SKILLS

- Medical Terminology
- Intermediate CPT-4 & ICD-9 coding
- Customer Service
- Bilingual Spanish/English
- Wisconsin Notary Public
- SAVE- Systematic Alien Verification for Entitlements

George P. Hinton, FACHE
16745 Dane Court West • Brookfield, Wisconsin 53005
(m) 262-366-1165 • georgehinton87@gmail.com

VALUE STATEMENT

Strategic Executive with extensive experience leading people, building teams, improving and expanding programs and providing consultative services. Demonstrated success improving organization performance while establishing strong culture of engagement and partnerships. Strong knowledge of health care industry, medical education, policy, delivery models, financing and community relations. Proven track record in strategic management, building organizational consensus, and driving change to achieve organizational goals. Collaborative partner who excels at building relationships with all stakeholder groups.

PROFESSIONAL EXPERIENCE

THE HINTON GROUP, LLC, Milwaukee, WI

Healthcare and Business Consulting working with for-profit and non-for-profit organizations.

President, The Hinton Group, LLC

2012 to Present

Provide assessment support to Milwaukee County Behavior Health Pharmacy RFP Process. Facilitated Strategic Planning session with Outreach Health (FQHC) Board of Directors and Leadership Team. Served as Interim Chief Financial Officer (CFO) for Milwaukee Health Services, Inc. (FQHC). Participated as healthcare expert on several health community panels on issues about health care reform and impact.

President and CEO

AURORA HEALTH CARE, Milwaukee, Wisconsin

Wisconsin's largest integrated health care system with annual income of \$3.7 billion and over 30,000 employees.

President, Aurora Sinai Medical Center (ASMC)

2008 to 2012

Led urban teaching medical center. Reported to Executive Vice President, Mid-Market, responsible for providing daily oversight of all aspects of licensed 350-bed facility, including policy/procedural development, marketing/business strategy and budgeting/fiscal management. Managed administrative team, over 700 physicians, 1,300 caregivers and a budget of over \$230 million annual. Led coordination of Medical Center EMS conversion from Cerner to Epic.

- Built top-performing team of health care professionals and instilled shared commitment to quality and empathetic patient care. Result: Increased patient experience scores over 50% (top CMS patient experience scores of Metro Milwaukee Medical Centers).
- Increase caregiver engagement and health and reduced cost by implementing a wellness program for staff and visitors. Result: Enhanced site caregiver engagement with 74% agreement score.
- Created a community advisory group, called ASMC thought leaders to support public relation and community engagement by generating ideal about patient experience and population health tactics.
- Conducted a strategic planning process. Result: created a sustainability plan for the medical center.
- Implemented the right sizing of the Medical Center in 2011 and 2012. Result: reduced cost \$15 million through the reduction of staff and services.
- Outperformed annual budget goals consistently, generating increased profitability. Result: Achieved record growth and revenues in 2009 and 2010. Exceeded budget expectation 2004 thru 2012.

George P. Hinton, FACHE, Page 2

Vice President, Aurora Health Care Academic Affairs and Aurora Sinai Medical Center 2004 to 2006
Managed restructuring of medical center to improve fiscal and quality performance. Strengthened partnership between AHC and University of Wisconsin (UW) School of Medicine and Public Health.

- Served as executive champion of Planétree Patient-Centered model implementation at Aurora Sinai and Aurora UW Medical Group. Result: Established comprehensive metrics and tracking methods that demonstrated significant improvement in client satisfaction, employee engagement and business growth.

Vice President, Aurora Health Care Academic Clinics 2001 to 2004

Responsible for administration and operation of clinics associated with Aurora UW Medical Group.

- Introduced and implemented Planétree Patient Centered model (?) for Aurora UW Medical Group (AUWVG) practices. Result: Improved productivity and reduced annual costs.
- Consolidated and standardized practices at AUWVG to improve physician teaching. Result: 10% increase in recruitment of residents into Aurora practices.
- Developed benchmarking practices to track productivity and cost/revenue of delivery practices for medical education programs. Result: Reduced expenses 25% and improved ROI for medical education investment.

Director, Workforce Planning

2000 to 2001

Responsible for establishing a leadership and professional diversity culture.

- Established strategic plan and framework for system wide diversity program. Result: 20% increase in diversity offered through *workplace of choice* recruitment, hiring, development and retention processes.
- Created Aurora Leadership Academy to identify top talent and provide leadership training/mentoring for prospective health care professionals. Result: Achieved recognition from national professional organization for innovative program.

INROADS INC., Milwaukee, WI

Global organization that prepares underserved youth for corporate and community leadership through internships.

Executive Director, INROADS Wisconsin

1997 to 2000

Responsible for all organization operations in Southeastern Wisconsin.

- Effectively utilized all aspects of entrepreneurial leadership to enhance visibility, reputation, and success of organization. Results: 25% increase in number of college interns placed in sponsoring corporations.
- Developed and implemented integrated marketing communication plan that significantly enhanced INROADS Wisconsin reputation as resource to increase minority corporate representation. Results: 75% increase in internship sponsors, 87% increase in student intern placement and 50% increase in brand recognition through local and regional media.

CHILDRENS HEALTH SYSTEM OF WISCONSIN, Milwaukee, WI

Independent health care system dedicated to the health and well-being of children with annual income of \$700 million.

Director, Orthopedics, Radiology and Ambulatory Rehabilitative Services

1994 to 1997

Reporting to Vice President Clinical Operations, responsible for supporting five medical directors and administration of Rehabilitative Services, Radiology Services and Orthopedic Clinics. Accountable for compliance to clinical standards established by medical directors, hospital administrators and regulatory agencies. Managed annual budget of \$100 million.

- Led improvement of integration of services between diagnostic, surgical, inpatient and clinic areas. Results: 35% increase in referrals and 40% increase in financial results.
- Created and implemented process improvement in all clinics. Result: Improved physician relationships through communication methods that engaged medical staff participation in expediting issue resolution.
- Empowered staff to identify improvement opportunities and implement creative problem-solving action. Result: 55% increase in service excellence.

• George F. Hinton, FACHE, Page 3

Director, Radiology

Prior to 1994

Managed operations of services including Diagnostic Radiology, Nuclear Medicine, Ultrasound, CT, and MRI with team of 70 and budget of \$100 million.

- Introduced team empowerment concepts to staff operations. Result: Streamlined processes and 50% cost reduction.
- Redesigned operational systems and led staff training. Result: 45% increase in internal and external customer satisfaction scores.

Manager, Rehabilitative Services

Managed operations of Dental Clinic, Child Psychiatry, Child Development, and Craniofacial, Genetics centers with a combined annual budget of \$40 million. Responsible for leading cross functional team of 75 that provided services to over 75,000 patients annually.

- Led customer service training and encouraged open communications. Results: Patient satisfaction scores increased by 38%.

Held managerial positions in health care and retail organizations.

EDUCATION

MS, Healthcare Administration, University of Alabama, Birmingham, AL (1991)
BBA, Finance, University of Wisconsin-Milwaukee, Milwaukee, WI (1988)
AAS, Business Administration, Milwaukee Area Technical College, Milwaukee, WI (1984)

FELLOWSHIPS AND INTERNSHIPS

Veteran Affairs Medical Center, Jackson, MS
Cooper Green Hospital, Birmingham, AL
Children's Hospital of Wisconsin, Milwaukee, WI

MILITARY

United States Marine Corp

BOARD LEADERSHIP AND PROFESSIONAL AFFILIATIONS

Board Member, Institute for Leadership Diversity (AHA)
Fellow, American College of Health Care Executives (ACHE)
Board Member, Medical Society Milwaukee County (MSMC)
Board Member, Milwaukee Area Workforce Investment Board (MAWIB)
Board Member, Milwaukee Area Technical College Foundation (MATC)
Board Member and Chairman, The Center for Self-Sufficiency (CFSS)
Board Member and Chairman, King's Academy (KA)
Adjunct Faculty, Cardinal Stritch University
Member, Rotary Club Milwaukee
Member, SCORE Southeastern Wisconsin

NATASHA L. KING, CPA

4041 N Richards Street
Milwaukee, WI 53212
(414) 906-2744
nking@cr-sdc.org

PROFESSIONAL EXPERIENCE

- 8/2014 – Present **SOCIAL DEVELOPMENT COMMISSION (SDC)**
Director of Finance
- 3/2011 – 7/2014 **MILWAUKEE HABITAT FOR HUMANITY, INC(MHFH)**
Finance Director
Accounting
- Managing the financial day to day operational aspects of MHFH.
 - Develop and implement measures to improve financial control mechanisms, reporting and accounting systems.
 - Responsible for the oversight and delivery of annual budgets.
 - Produce, analyze and distribute internal and external financial reports on all projects accurately and in a timely manner.
 - Prepare and facilitate annual audit, individual program audits and annual financial reports.
 - Map out Finance and Accounting team goals that are fully aligned with the organization's goals, mission, vision and values.
 - Staff the Finance Committee of the Board of Directors
 - Supervise an accounting staff of 5(2 FTE and 3 volunteers)
- Loan Services**
- Oversee loan services for MHFH of over 400 loans.
 - Manage relationship with MHFH and third party mortgage service provider.
 - Supervise the acquisition and sale of properties.
 - Manage the foreclosure process.
 - Staff the Mortgage Stewardship Committee of the Board of Directors
 - Supervise a loan services staff of 3(1FTE and 2 volunteers)
- Human Resources**
- Review and recommend annual benefit renewals.
 - Coordinate the enrollment and benefit changes for eligible staff.
 - Manage relationship with MHFH and third party payroll processor.
 - Manage employee benefits and track usage.
 - Supervise the Office Manager who oversees the posting of open positions and hiring of new employees.
- 09/05 – Present **BRYANT & SRATTON COLLEGE**
Adjunct Faculty
Teaching Accounting Principles I & II
- Develop a 15 week syllabus for course, complete with classroom policies and weekly work schedule.
 - Provide skills assistance to students as needed.

- Create and Design course materials including handouts, chapter outlines, quizzes and exams.
- Evaluate student's progress and make recommendations for improvement.
- Craft and deliver three hour lectures for the 15 week semester.
- Maintain grades, attendance and class participation records for retention by College.
- Attend department and faculty meetings.

EDUCATION

UNIVERSITY OF WISCONSIN - MILWAUKEE
Masters Degree, Accounting, December 2001

UNIVERSITY OF WISCONSIN - EXTENSION
Certification - Credit and Home Buyer Counseling, April 2000

RIPON COLLEGE, Ripon, Wisconsin
Bachelor of Arts, Major in Economics, May 1993
Emphasis in Accounting and Leadership

COMMUNITY LEADERSHIP ACCOMPLISHMENTS/

- President, National Coalition of 100 Black Women Milwaukee Chapter
- Not-For-Profit Committee Member, WICPA
- Vice-President of the Clarke Street Neighborhood Association
- Director, Alpha Chi Omega National Housing Corporation Board
- Certificate in Multi-Family Housing Development Finance through The National Development Council
- Served as Northside YMCA's Strong Kids Campaign Chair 2005 & 2006 raising over \$1.6M to support community scholarships and programs.
- Member of the Sponsorship Committee for the Executive Women Golf Association (EWGA)
- Volunteer for the Salvation Army and HeartLove Place
- Recognized as 100+ YMCA Black Achiever and Continuing Alumni

COMPUTER SKILLS

- Microsoft Office Applications (All)
- QuickBooks
- MIP
- Desktop Publishing
- Fx Engagement
- APG

Biography for Pamela Biagui, MSM, SPHR

Pamela Biagui is a seasoned Human Resources professional with more than 15 years of progressive experience designing and implementing human resources policies, processes and procedures. She has the breadth and depth of knowledge in all HR disciplines including, recruitment, leadership development, coaching, and performance management. Additionally, Pamela has effectively leveraged her knowledge and experience by focusing on the “big picture” to help businesses, of all sizes and types, successfully achieve strategic organizational objectives through human capital management solutions.

Pamela earned her Master’s Degree in Business Management from Cardinal Stritch University in 2002. She has also achieved national certification and designation in Human Resources by earning her SPHR (Senior Professional Human Resources) certification. In addition, Pamela has earned an array of other organizational development certifications that help her contribute to the strategic effectiveness of for-profit and nonprofit organizations.

Position Descriptions:

- EA Program Manager
- Site Supervisor /Outreach
- Hotline Coordinator
- Hotline Representative
- Case Manager
- Intake Specialist/Screenener
- Lead Processing Specialist
- Processing Specialist

Job Title:	Energy Assistance Program Manager	Status: (E/NE)	Exempt
Department/Program:	Energy Assistance	Reports to:	Program Services Director
Location:	Richards	Travel Required:	Yes
Grade:		Position Type:	
Management: (Yes/No)	Yes	HR Contact:	Pamela Biagui

Job Purpose: Energy Assistance Program Manager is responsible for the overall management and coordination of the Energy Assistance Program. Responsibilities include but not limited to program development, management of program budgets, workflow coordination and site assessments. Serve as liaison between programs, utilities, state, county and city departments, working to develop coordinated activities designed to address the utility needs of the low income Milwaukee community.

Essential Duties:

- Act as liaison between programs, utilities, and state, county and city departments.
- Responsible for ensuring compliance with procedural issues and interpretation of government contracts. Keep up to date with the rules and regulations of the energy program in order to answer questions and make informed decisions regarding the energy application and client eligibility. Facilitate training sessions of staff, authorized representatives and site personnel on program changes.
- Develop and monitor program budget. Analyze staff activity to ensure proper salary allocations between Administrative, Outreach, and Crisis Supportive Services and LIP.
- Manage Energy Team, hiring, training, coaching and developing performance standards and measures.
- Compile and analyze data and make recommendations for program operations, including production, staffing patterns, seasonal client fluctuations, selection of sites, etc. Ensure departmental and program goals are met. Work with internal Quality Assurance to develop monitoring standards which conforms to funders expectations. Ensure internal and external program reporting is completed accurately and timely which outlines program activity for distribution to internal management and funding sources.
- Prepare for new energy seasons by scheduling planning sessions, updating program forms, creating training packets and contacting sites. Coordinate site schedules to ensure adequate staffing at each location. Guide the program on new initiatives such as educational programs in waiting rooms, client self-serve initiatives, systems integration.
- Monitor and assess Hotline activity for incoming call volume, wait times to determine staffing level needs or additional support. Monitor and address staff non response to crisis issues reported on the after-hours crisis line or 211 referrals.
- Oversee intensive case management according to agency guidelines for short term and long term needs and outcomes of families.
- Perform 100% of file review of all program furnace referral.
- Attend monthly planning meetings with Milwaukee County Strategic Planning Group in the exchange of information, review program updates, and develop program initiatives to address and reduce the energy burdens that plague the low income community.
- Ensure resolution of customer complaints with Leads and Supervisor by analyzing the situation, informing and or enforcing energy program policies. Document complaints involving workers and take appropriate action with staff. Handle all escalated complaints.
- Coordinate outreach activity with other community based organizations and Senior Citizen sites ensuring all communities are served. Assign Home/Phone visit requests ensuring that the homebound and the elderly households are properly serviced.

- Monitor Cap60 and CARES data bases to ensure accuracy, monitor agency promises posted to Agency Solutions at WE Energies and administer KWWF and Heat for Heroes funds.
- Develop informational marketing material for the program for community distribution and website marketing. Respond to media concerning the program activity and messaging.

Skills/qualifications: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Have the ability to write reports, business correspondence, and procedure manuals; to effectively present information and respond to questions from groups of managers, clients, customers, and the general public and the ability to read, analyze, and interpret governmental regulations. Additional skills include excellent communication skills; the ability to work in a multicultural environment; excellent leadership and problem solving skills. Maintain confidentiality of written or verbal information. Excellent analytical skills. Superior organizational skills. Understanding of business and financial matters. Computer skills, including word-processing; database; spreadsheets (including design). Valid Wisconsin Driver's License and agency required insurance levels.

Experience/Education/Training/Certifications:

Bachelor's degree in social work or related area with five to seven years related experience and/or training; prior management experience required, skills in strategic planning and data analysis a plus. Demonstrated experience in direct delivery of services and contract management.

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee works regularly in an office environment where the noise level is moderate.

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by staff assigned to this position. They are not be construed as an exhaustive list of all responsibilities, duties, and skills required. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date:	
HRIS Title:			

Job Title:	Site Supervisor	Status: (E/NE)	Exempt
Department/Program:	Energy Assistance	Reports to:	Program Manager
Location:	Richards	Travel Required:	
Grade:		Position Type:	FT, Regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose:

Position is responsible for managing the day-to-day operations of the Energy Program. Train and supervise work of Lead Processing Specialists, Processing Specialists, and Receptionist.

Essential Duties:

- Supervise Staff(hiring, training, coaching, and develop performance standards and measures
- Resolve customer complaints by analyzing the situation, informing and or enforcing energy program policies.
- Document complaints involving workers and take appropriate action with staff.
- Work closely with and support program manager
- Monitor daily activities to ensure that all procedures and regulations are being followed. Randomly review Lead Specialist applications on a weekly basis Work closely with and support program manager
- Perform biweekly analysis of time cards to ensure proper allocations out of administrative, crisis, outreach.
- Attend meeting as needed within SDC and with outside groups related to energy. Work closely with and support program manager

Experience/Education/Training/Certifications: Associates Degree in Human Services or related field, 5-7 years of supervisory experience or related experience

Skills/qualifications:

- Excellent Customer Service Skills
- Computer knowledge such as typing, Microsoft word, excel, outlook, and adobe formatting and the ability to multi-task.
- Ability to work in a multicultural environment.
- Maintain confidentiality of written or verbal information.
- Ability to write reports, business correspondence and procedure manuals.
- Ability to effectively present.

Preferred skills, knowledge, or abilities: Bilingual

Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
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Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works regularly in an office environment where the noise level is moderate.

Disclaimer:

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Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date/Time:	
HRIS Title:			

Job Title:	Energy Hotline Coordinator	Status: (E/NE)	Non-Exempt
Department/Program:		Reports to:	Energy Supervisor
Location:	Richards	Travel Required:	
Grade:		Position Type:	FT, Regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose:

Coordinates the day to day operations of the Energy Assistance Program hotline. Responsible for answering all incoming Energy Calls, greeting callers, establishing reason for calling, and resolving issue by contacting appropriate person to assist client's needs

Essential Duties:

- Assist with the monitoring and resolution of unit concerns; work with Manager to set appropriate performance standards, analyze staffing levels, assist with interviewing and selection of new employees; facilitate staff training, coaching, cross-training and mentoring; provide feedback for units annual performance evaluations.
- Determines and directs workflow procedures of their area(s).
- Analyzes and/or evaluates in-place practices and systems to ensure daily operations; prioritizes work to meet timelines, manages continuous improvement of units policies, procedures and operational methods; assist with the editing of units job profiles.
- Understands Energy Assistance Program operations and policies and effectively communicates Energy policies and procedures to clients and hotline staff
- Assist with the interviewing and training of new hires and monitors their progress
- Able to make recommendations and handle complaints and requests
- Acts as liaison between EA and the IT Department for phone system
- Responsible for coordinating incoming and outgoing phone calls in Hotline ensuring the hotline staff adheres to the benchmarks established.
- Assists with the Interviewing, training and monitoring new hires for hotline rep positions
- Coordinates day to day operations of hot line.
- Make sure that the phone system is up and available to receive incoming and outgoing calls.
- Use software to monitor calls.
- Make sure all voice mails are checked and messages returned.
- Make sure that enough resources are available to take incoming and make outgoing calls.
- Monitors Online Appointment Scheduling system.

Skills/qualifications:

- Strong computers skills, including Outlook.
- Ability to learn to use new software applications efficiently.
- Must be able to handle a large volume of phone calls.
- Must maintain program integrity by treating each client with respect and protecting clients' documents and personal information.
- Problem-solving, flexibility leadership /supervisory skills, and a team player

Experience/Education/Training/Certifications:

- Associate Degree and five years related experience, working in call center and/or in customer service or administrative support

Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
The employee works regularly in an office environment where the noise level is moderate.

Disclaimer:

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Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date/Time:	
HRIS Title:			

Job Title:	Hotline Representative	Status: (E/NE)	Non-exempt
Department/Program	Energy Assistance Program	Salary range	TBD
Location:	Richards	Travel Required:	Local
Grade:	TBD	Position Type:	Regular, Full Time
Management: (Yes/No)	NO	HR Contact:	Director, Human Resource

Job Purpose:

This position requires exceptional internal and external customer service skills. In the Hotline you must be able to handle a high volume of calls in Spanish and English and maintain professional during escalated calls. During incoming/outgoing calls the Hotline rep must assist customer in one of various ways: submitted a referral for a workshop or to a case manager; answer a general question; or redirect call to another program within SDC or to another resource within the community. Retrieve the messages from the voice mail in the English and Spanish. Communicate with We-energies to advocate on the clients behalf.

Essential Duties:

- Answering Incoming calls: Answer a series of questions to assist client facing disconnection and if so take appropriate action.
 - Inform clients of their appointment status using Outlook calendar or other scheduling software.
 - Communicate with clients via telephone regarding Energy Assistance program information.
 - Making outgoing calls: answer voicemails/returning client calls within a timely manner and provide assistance/ answer client's question.
 - We-energies: Contact We-energies in regards to the clients account.
 - Referrals: Submitted referrals to case managers when clients are in a disconnection or have a high balance on there we-energy bill.
 - Internal Customer Service: Communicate with staff to resolves any issues that a caller may have
- Additional resources: Provided additional resources to clients as needed. Ex: housing, food, clothing and employment.

Skills/qualifications:

- 1 year experience handling calls in a professional manner at all times; telephone customer service related experience, and/or call center experience.
- Hotline Rep must be able to handle all calls in a timely and professional manner in a fast paced environment.
- Ability to respond to a high volume of incoming and outgoing phone calls.
- Ability to review and protect personal and confidential client information and scheduling client appointments.
- Hotline Rep must be able to handle and escalate calls when client is upset

Preferred Skills/qualifications:

- Previous training experience a plus

Experience/Education/Training/Certifications:

- High School Diploma or GED

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to

enable individuals with disabilities to perform the essential functions. The phrases “occasionally,” “regularly,” and “frequently” correspond to the following definitions: “Occasionally” means up to 1/3 of working time, “regularly” means between 1/3 and 2/3 of working time, and “frequently” means 2/3 and more working time.

- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 10 pounds and occasionally up to 25 pounds.

Work Environment:

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- The employee works regularly in an office environment where the noise level is moderate.

Disclaimer:

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Reviewed By:	Donna M. Kaczmarek, Director HR	Date:	11/7/2012
Approved By:	Donna M. Kaczmarek, Director HR	Date:	11/7/2012
Last Updated By:	11/7/2012	Date/Time:	
HRIS Title:			

Job Title:	Case Manager	Status: (E/NE)	Exempt
Department/Program:	Energy Assistance	Reports to:	Energy Program Manager
Location:		Travel Required:	
Grade:		Position Type:	Full-time regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose:

Provide one on one case mgmt to consumers of Energy Assistance program. This includes assessment, allocation of funds, and long-term monitoring of clients. In addition, case managers attend community events of various types in order to extend services through other social service agencies and community partners.

Essential Duties:

- Provide long-term case management services for select participants of Energy Assistance Program.
- Complete assessment of clients as referred through Energy Processing Specialists, Utility Co. and other CBO's.
- Assist clients develop plan to minimize future crisis situations.
- Develop individualized service plan with clients to identify needs and motivations to address barriers.
- Advocate for clients for retention of services with the utility company and other entitlement agencies while maintaining a favorable working relationship
- Monitor goals established in client's individualized service plan to ensure positive outcomes. i.e.: compliance with co-payment agreements, educational plans, financial literacy etc.
- Follow up and respond to client referrals made internally and externally to other program services as needed based upon individualized service plan.
- Develop and maintain paper files and database of services rendered to participants, as proposed by the funding source and SDC, including other reports requested by agency
- Community Outreach: provide on-site services to local community agencies, health centers, and faith-based programs.
- Address special circumstances/needs for those clients referred by EA processor, lead, or supervisor for crisis assistance.
- Provide support to processors, leads, supervisors for additional projects and referrals.

Skills/qualifications:

- Strong written and verbal communication skills.
- Ability to communicate effectively with a wide range of individuals and families
- Working knowledge of social programs and community resources
- Maintain confidentiality of written or verbal information. Ability to work well independently and as a team member.
- Computer skills including WORD, EXCEL, database (including developing and maintaining reports).

Preferred:

- Working knowledge of social programs and community resources.

Experience/Education/Training/Certifications: Bachelor's degree in Social Work, Psychology or related field and 2 years of case management experience.

Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

Work Environment:

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The employee works regularly in an office environment where the noise level is moderate.

Disclaimer:

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Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date/Time:	
HRIS Title:			

Job Title:	Intake/ Screener/Receptionist	Status: (E/NE)	Non-exempt
Department/Program:	Energy Assistance	Reports to:	Program Supervisor
Location:	Richards	Travel Required:	
Grade:		Position Type:	FT, Regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose:

Responsible for making a positive first impression on clients. Manage client flow and intake process. Verify household identification by Wisconsin ID and/or Wisconsin driver licence, social security cards and/or other government documents. Verify all income documents for the household and energy accounts. Provide resources to clients that has any missing information needed to complete their application with the Energy Processing Specialists.

Essential Duties:

- Review each client's documents to ensure they are prepared for the application process; by informing client of proper documentation required.
- Promote a positive environment in the Energy front desk/screening area by providing excellent customer service to all clients.
- Protect client's confidentiality. Follow client's documentation/confidentiality procedures at all times.
- Return phone calls as assigned. Answer client questions. Refer clients as necessary to Leads and/or Supervisors.
- Fax positive id applications to WE Energies and other documents to sources and assist Energy Processing Specialists and Leads with filing of certification pages, notice of understanding, sign-in sheets, etc.
- Schedule and/reschedule client appointments as needed.

Experience/Education/Training/Certifications: High School Diploma or GED; 1 year customer service and data entry skills

Skills/qualifications:

- Ability to effectively present information and respond to questions from clients, customers, and the general public. Excellent customer service skills. Good communication skills
- Ability to add, subtract, multiply, and divide. Basic computer skills.
- Ability to solve practical problems where a few concrete variables from the standard occur. Ability to interpret instructions furnished in written and oral form.

Preferred skills, knowledge, or abilities: Knowledge of the program and other resources regarding the program.

Physical Demands:

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Work Environment:

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The employee works regularly in an office environment where the noise level is moderate.

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Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date/Time:	
HRIS Title:			

Job Title:	Lead Processing Specialist	Status: (E/NE)	Non-exempt
Department/Program:	Energy Assistance	Reports to:	Program Supervisor
Location:	Richards	Travel Required:	
Grade:		Position Type:	FT, Regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose:

Provide processing specialist with answers to questions related to energy assistance, per manual, verify information on applications that has been entered correctly and accurately. Provide assistance to the supervisor and program manager as requested. Work with clients who have grievances and attend fair hearings. Mainly make sure that "client flow" is running good on a daily basis.

Essential Duties:

- Monitor workers applications for errors, use CARES system, write-up errors give to workers to correct. Prepare letters for customers who can not be reached via telephone.
- Enter KWWF / Crisis in WHEAP system and Agency Solutions only Lead can enter the KWWF crisis. Check Crisis/KWWF referrals to see if customer is eligible for emergency assistance.
- Make sure work flow runs smoothly, assist front desk as needed or assisting worker to help out, assist with workshop scan appointments, inform case manager assistant if client needs to be rescheduled etc.
- Serve as a first point of contact for client complaints and try to resolve before supervisor would need to intervene. Set appointment with clients who are difficult for workers to deal with.
- Schedule appointments late night and Saturday online scheduler, make appointments in outlook calendars, open and close building as needed.
- Monitor workers arrival, break and departure times, and assist supervisor in time motorning

Skills/qualifications:

- Required skills would be language skills, and math skills, able to talk a respond to client and worker well. Communicate effectively.
- Required skills would be reasoning skills, able to solve practical problems, able to interpret instrcutions, in writing or verbal.
- Required skills would be physical demands like lift some very light boxes or help with supplies, or go to different locations and,or home visits when asked, or go to trainings.

Experience/Education/Training/Certifications:

High school diploma plus 2 years customer service High in recomandations and 3 years of Customer Service

Preferred:

- It would be good if I came in with more computer knowledge or even need to take a typing test to score high on typing would be good be good for this line of work because of the changes like for Error Data.
- I preferred more knowledge in organization. Organization is a tool that is more needed and need to be more performance when it comes to being well organized.

Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

Work Environment:

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Reviewed By:	Pamela Biagui, Director HR	Date:	
Approved By:	Pamela Biagui, Director HR	Date:	
Last Updated By:	Pamela Biagui, Director HR	Date/Time:	
HRIS Date:			

Job Title:	Energy Processing Specialist	Status: (E/NE)	Non-Exempt
Department/Program:	Energy Assistance	Reports to:	Supervisor, Energy
Location:		Travel Required:	
Grade:		Position Type:	Full-time regular
Management: (Yes/No)	No	HR Contact:	Pamela Biagui

Job Purpose: Conducts interviews of applicants seeking energy assistance and inputs application information directly into the wheap system software.

Essential Duties:

- Conducting interview of the client for energy assistance benefit. Assist clients with the energy assistance application process.
- Verify client information with outside agencies. Enter information and factual data on case records using the wheap system software.
- Contacting external vendors and resources for information or referral opportunities for the client. Contact fuel vendors and outside agencies for information to determine eligibility for energy assistance.
- Contacting internal resources for information and referral opportunities for the client. Refer social service problems to case managers.
- Maintain, prepare, and file necessary paperwork(daily reporting forms, client certification forms, referral forms,etc) for energy assistance program.
- Participate in outreach activities.

Skills/qualifications:

- Strong verbal and written communication skills with the ability to effectively present information and respond to questions from clients, customers, and the general public.
- Interviewing skills for the purpose of gathering and verifying pertinent information for the completion of forms; perform basic mathematical computations, interpreting rules and regulations and reviewing forms or documents for completeness and accuracy in social services
- Computer and data entry skills and ability to understand the state guidelines coinciding with the LIHEAP procedures.
- Ability to access and determine the correct application process for the client.
- Prepare and expedite external/internal agency forms.
- Ability to work in a fast paced diverse environment and to find the resources to assist the client.

Experience/Education/Training/Certifications: High School Diploma or GED and 1 year experience of Non-Profit organizations or Social Services setting with data entry experience; Human Services/Customer Service or applicable experience.

Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

Work Environment:

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Disclaimer:

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Reviewed By	Pamela Biagui, Director HR	Date	
Approved By	Pamela Biagui, Director HR	Date	
Last Updated By	Pamela Biagui, Director HR	Date/Time	
HRIS Title			

Items 33 and 34 partially comprise the points scored under Staffing Plan

YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Program Manager NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 2,088

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): 1/1 = 100 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

Item 34 is available as a download from: <http://county.milwaukee.gov/DHHS> bids
This form should be submitted electronically along with the budget spreadsheet

Items 33 and 34 partially comprise the points scored under Staffing Plan

YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM #33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Program Assistant NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 2,087.50

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 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

Item 34 is available as a download from: <http://county.milwaukee.gov/DHHS/bids>
This form should be submitted electronically along with the budget spreadsheet

Items 33 and 34 partially comprise the points scored under Staffing Plan

YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Site Supervisor NO. OF STAFF: 3

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 6,965.04

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): 1/4 = 25 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Outreach Supervisor NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 2080

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%

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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This form should be submitted electronically along with the budget spreadsheet

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Lead Processing Specialist NO. OF STAFF: 3

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 6,218.75

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 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Case Manager NO. OF STAFF: 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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 7,242.85

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): 2/5 = 40%

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM #33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Case Manager Asst. NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 1,597.25

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%

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Hotline Coordinator NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 1,887.30

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): 1/1 = 100%

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Hotline Rep NO. OF STAFF: 4

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 5,258.71

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 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Receptionist/Intake Specialist NO. OF STAFF: 3

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing his application: 4,558.75

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 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

Item 34 is available as a download from: <http://county.milwaukee.gov/DHHS/bids>
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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM #33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Outreach Processing Specialist NO. OF STAFF: 7

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 0

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 %

New position for 2015-16

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):
N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34
Item 34 is available as a download from: http://county.milwaukee.gov/DHHS_bids
This form should be submitted electronically along with the budget spreadsheet

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YEAR 2014 STAFFING REQUIREMENTS-DIRECT SERVICE STAFF

ITEM # 33

Indicate the number of staff directly related to achieve your objectives for the program(s) you are applying for, 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 34) 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 Energy Assistance 2015 PROGRAM No. MSD 001

POSITION TITLE Maintenance/Security NO. OF STAFF: 1

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: \$0.00

Actual total hours worked for all employees in this position for the 12 months prior to completing this application: 2,085

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): 1/1 = 100 %

For New Applicants for this program who may not have had previous history employing individuals to provide these services, provide annual turnover for the agency as a whole (show calculation):

N/A

For Behavioral Health Division proposals, include copies of staff licenses, certifications and diplomas.

CURRENT DIRECT SERVICE PROVIDER AND INDIRECT STAFF (DSP) ROSTER Item #34

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This form should be submitted electronically along with the budget spreadsheet

PP-87

ver 6-27-13

Office only:

QUESTIONED ASSISTANCE?? Contact your designated Contract Service Director

CURRENT DIRECTOR, AGENCY PROVIDER AND INDIRECT STAFF (DSP) ROSTER

Agency Name: Community Relations - Social Development Commission
 Agency Address: 1000 W. Wisconsin Ave., Milwaukee, WI 53233
 Agency Phone: 414-224-3300
 Agency Fax: 414-224-3300
 Agency Website: www.milwaukee.gov
 Agency Email: communityrelations@milwaukee.gov
 Agency Director: David J. Smith
 Agency Supervisor: David J. Smith
 Agency Contact: David J. Smith
 Agency Contract #: 00787015
 Agency Contract Start Date: 08/20/15
 Agency Contract End Date: 08/20/15

FORM INSTRUCTIONS:
 STEP 1 - Complete Form Electronically, one for each program. List each DSP (if DSP works in more than 1 program, list them on the roster for each program)
 STEP 2 - Submit information in all yellow highlighted areas on Staff roster.
 STEP 3 - Submit Staff Roster electronically to your contract service coordinator at: CHS@CSC.milwaukee.gov

Certification Statement and Rescind Provider Credentials and Information provided below
 The contractor certifies the following is accurate and true: (1) all providers' licenses and certificates as listed above are current and valid; (2) providers are current and up-to-date with all training requirements as required by the State of Wisconsin; (3) the agency has a system in place to verify providers' credentials and completion of required education and training; and (4) the agency maintains all provider credentials on file and agrees to make these documents available for review upon request by Milwaukee County DHS, and 3-Part CBE, and Out-of-State CBE, or FBI Fingerprint Check has been reviewed and meets WI caregiver law, Milwaukee County Resolution 99-233 (if serving children and/or youth) and substantially related text (refer: POS Contract).

Authorized Signature: [Signature] Date: 7/4/15
 Title: Board Chair
 Agency: Community Relations - Social Development Commission
 Typing your name constitutes your signature.

Employee Name	EMPLOYER	INDIRECT SERVICE PROVIDER	SERVICE START DATE (Full Date of Birth)	PROVIDER TITLE	Academic Degree(s)	Licenses / Certificates	# of Hours - Related In-Service/Conf. in Edu. Completed in Previous Year	Years of Experience in related field	Years of Experience with clients in target pop.	Let language spoken, one per English	Staff Transports Clients (Y or N)	if Transports Drivers License per agency review of Driving Record Abstract (Y, N or NA)	DOJ data (Y or N)	DOJ Record (Y or N)	Date of BFO (Y or N)	Answer to Q.1 on BFO (Y or N)	Per BFO (4) - List outside the state of WI, if in state 3 (Y, N or NA)	Out-of-State CBE or FBI Fingerprint Check last record (Y, N or NA)	Date of DHS Findings LETTER (Y or N)	DHS Later Findings (Y or N)				
																					1	2	3	4
LAST, FIRST																								
Aspelt, Shaina	X		04/22/2014	Program Coordinator	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Berly, Shantia	X		06/02/2004	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Barnes, Wanda	X		04/22/2013	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Benson, Diana	X		07/18/2005	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Burnett, Yvonne	X		04/22/2001	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Czarnes, Monica	X		03/08/2007	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Clyburn, Janice	X		10/14/2005	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Colman, Yolande	X		03/02/2006	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Conner, Whitney	X		10/27/2013	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Crab, Daria	X		02/28/1995	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Davis, Monique	X		06/18/2008	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Visent, Lisa	X		06/18/2008	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Ellis, Luanis	X		08/22/2006	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Franco, Evelyn	X		10/10/2005	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Green, Phyllis	X		02/27/1967	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Street, Cheryl	X		08/02/2008	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Harris, Pamela	X		10/10/2007	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Johnson, Vicki	X		09/11/2005	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Johnson, Liane	X		10/24/1986	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				
Jones, Savannah	X		08/02/2011	Case Manager	NA	NA	NA	NA	NA		N	NA	NA	NA	NA	NA	NA	NA	NA	NA				

Item 36 partially comprises the points scored under Cultural Diversity and Cultural Competence and under Staffing Plan.

CLIENT CHARACTERISTICS CHART

ITEM # 36

ETHNICITY DEFINITIONS

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 China, Japan, Korea, the Philippine Islands and Samoa.
2. **Black:** All persons having origins in any of the Black racial groups in Africa.
3. **Hispanic:** All persons of Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin, regardless of race. (Excludes Portugal, Spain and other European countries.)
4. **American Indian or Alaskan Native:** All persons having origins in any of the original peoples of North America, and those persons who maintain cultural identification through tribal affiliation or community recognition.
5. **White:** All persons who are not Asian or Pacific Islander, Black, Hispanic, or American Indian or Alaskan Native.

HANDICAPPED DEFINITIONS

A handicapped individual is defined pursuant to Section 504 of the Rehabilitation Act of 1973.

1. Any person who has a physical or mental impairment which 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. Any person who has a record of such impairment; or,
3. Any person who is regarded as having such impairment.

Describe your data source for completing this form. If your projected client composition differs from your previous year's actual client composition, describe the basis for the difference.

2015 CLIENT CHARACTERISTICS CHART

ITEM # 36

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 1
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	1,225	4.9%	1,074
b. Black	20,250	81%	17,710
c. Hispanic	1,750	7%	1,465
d. American Indian or Alaskan Native	275	1.1%	263
e. White	1,500	6.0%	1,416
TOTAL	25,000	100.00%	21,928

5. Other:

a. Handicapped individuals	11,925	46.5%	10,466
b. Not applicable	13,375	53.5%	11,462
TOTAL	25,000	100.00%	21,928

Date Submitted: March 27, 2015

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 2
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	666	3.7%	578
b. Black	13,950	77.5%	12,160
c. Hispanic	1,440	8.0%	1,250
d. American Indian or Alaskan Native	198	1.1%	172
e. White	1,746	9.7%	1,460
TOTAL	18,000	100.00%	15,620

5. Other:

a. Handicapped individuals	8,280	46%	7,393
b. Not applicable	9,720	54%	8,227
TOTAL	18,000	100.0%	15,620

Date Submitted: March 27, 2015

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 3
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	342	5.7%	283
b. Black	4,812	80.2%	4,025
c. Hispanic	396	6.6%	328
d. American Indian or Alaskan Native	54	.9%	45
e. White	396	6.6%	292
TOTAL	6,000	100.00%	4,973

5. Other:

a. Handicapped individuals	2,500	42%	2,311
b. Not applicable	3,500	58.0%	2,662
TOTAL	6,000	100.0%	4,973

Date Submitted: **March 27, 2015**

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 4
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	774	4.3%	700
b. Black	13,896	77.2%	12,583
c. Hispanic	1,584	8.8%	1,432
d. American Indian or Alaskan Native	180	1.0%	163
e. White	1,566	8.7%	1,395
TOTAL	18,000	100.00%	16,273

5. Other:

a. Handicapped individuals	8,280	46%	7,543
b. Not applicable	9,720	54%	8,730
TOTAL	18,000	100.0%	16,273

Date Submitted: March 27, 2015

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)

2016 CLIENT CHARACTERISTICS CHART

Item # 36

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 5
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	167	3.7%	147
b. Black	3,370	74.9%	2,931
c. Hispanic	450	10%	354
d. American Indian or Alaskan Native	36	0.9%	36
e. White	477	10.5%	509
TOTAL	4,500	100.00%	3,977

5. Other:

a. Handicapped individuals	1,795	40%	1,795
b. Not applicable	2,705	60.0%	2,182
TOTAL	4,500	100.0%	3,977

Date Submitted: March 27, 2015

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)

Agency Name Social Development Commission (SDC)
 Disability/Target Group Zone 6
 Program Name Energy Assistance 2015 Program # MSD-001
 Facility Name & Address 4041 N. Richards Street, Milwaukee WI 53212

CY 2015 Estimated

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: N/A

	Number	Percent (%)	Prior year actual: EA 2014
a. 0 - 2		0.0%	
b. 3 - 11		0.0%	
c. 12 - 17		0.0%	
d. 18 - 20		0.0%	
e. 21 - 35		0.0%	
f. 36 - 60		0.0%	
g. 61 & over		0.0%	
TOTAL		100.0%	

3. Sex: N/A

a. Female		0.0%	
b. Male		0.0%	
TOTAL		100.0%	

4. Ethnicity:

a. Asian or Pacific Islander	165	3.3%	143
b. Black	3,710	74.2%	3,226
c. Hispanic	600	12%	419
d. American Indian or Alaskan Native	60	1.2%	52
e. White	465	9.3%	478
TOTAL	5,000	100.00%	4,242

5. Other:

a. Handicapped individuals	2,012	40%	2,012
b. Not applicable	2,988	60%	2,306
TOTAL	5,000	100.0%	4,318

Date Submitted: March 27, 2015

The total in each category must be equal to the number in Form 1, Column 1, Total Number of Cases (Clients) to be served per Year. (Rev 9/07)



MSD-001
Wisconsin Home Energy Assistance Program (WHEAP)

APPENDICES

1. CSBG Funding and Outcomes Since 2012
2. Senior housing sites and other community partners.
3. Greater New Birth Church Letter of Commitment
4. New Concept Self Development Letter of Commitment
5. Hmong American Friendship Association (HAFA) Letters of Commitment
6. Poverty Status of Individuals by Zip Code 2013-2014
7. SDC website screenshot
8. 2014-15 WHEAP flyer
9. Energy Assistance Checklist
10. Client Rights and Complaint Procedure brochure
11. QA results from 2013-14 Energy Assistance Surveys

CSBG Funding and Outcomes Since 2012

FUNDING	2012	2013	2014	2015
LIHEAP Operations	711,036.00	719,473.00	724,930.00	718,136.00
Outreach	345,767.00	345,594.00	352,762.00	349,396.00
Public Benefit Operations	320,032.00	312,513.00	324,516.00	311,957.00
Crisis Client Services	765,690.00	750,943.00	852,468.00	882,805.00
WX Operations (Furnace)	495,426.00	495,296.00	503,948.00	499,135.00
Public Benefit Crisis Client Services	121,262.00			
Amendment #1				211,726.00
Amendment #2				240,000.00
Total Allocated to Milwaukee County	2,759,213.00	2,623,819.00	2,758,624.00	3,213,155.00
Amount Retained by MC		283,195.00	257,857.00	538,961.00

Amount Subcontracted to SDC				
Operations	1,007,430.00	977,827.00	915,051.04	925,492.00
Crisis	560,710.00	348,903.00	517,788.52	293,975.00
Outreach	231,424.00	183,119.00	169,572.45	110,560.00
PB Crisis	103,075.00			
Supplemental Funding to SDC				60,141.00
Special County Outreach Activity				
Total Funding Allocated to SDC	1,902,639.00	1,509,849.00	1,602,412.01	1,390,168.00
% Of Funding	69%	58%	58%	43%

Sites Covered	3	3	3	3
Staff				
Lead Specialist	3	3	3	3
Specialist	22	22	20	20
Program Assistant	2	2	2	2
Clerical Support (Receptionist/Screeners)	4	4	4	3
Hot Line	4	4	4	4
Case Managers	4	4	3	3
Housing Coordinator	1	1	1	0
Supervisor	4	4	3	3
Total Staff	44	44	40	38
Total FTE	35	35	27	27

ACTIVITY/PRODUCTION				
Application Processing/WHEAP				
Total County	61,360	62,191	67,951	
Total SDC Site	47,488	51,627	49,104	
SDC %	77%	83%	72%	
Cost/Unit County	44.97	42.19	40.60	
Cost/unit SDC	40.07	29.25	32.63	

Furnace				
No Heat-Repair/Replacements - SDC	246	451	607	
Repaired	58	128	206	
Replaced	179	304	372	
Assessment	9	19	29	
Total Milwaukee County	246	451	607	0

SENIOR HOUSING SITES

A	B	C	D	E	F	
Zone	LOCATION	ADDRESS	ZIP CODE	CONTACT PERSON	# OF UNITS	
2	1	Claire Court	3049 & 3069 N. 59th Street	53210	Jennifer Westrick/ Jenniferw@stclaremgt.org	32
3	1	Wesley Scott Senior Apts	2802 West Wright Street	53210	Talibah Mateoa/ Elizabeth@milwaukeehidta.org	70
4	1	Clare Place	3284 north Sherman Blvd	53216	Jennifer Westrick/ Jennifer.w@stclaremgt.org	8
5	1	Fernwood Court	5700 west Appleton Ave	53216	Rose Dennis	120
6	1	The Gardens	3435-45 North 60th Street	53216	Brandy/ Jlewis.fmhousing@gmail.com	150
7	1	McGovern Park	4500 West Custer Ave	53218	Katie or Linda	70
8	1	Ridgewood Westridge Apartments	7901 W. Glenbrook Road	53223	westridgeridgewoodapts@gmail.com	150
9	1	Ridgewood Westridge Apartments	7470 W. Glenbrook Road	53223	westridgeridgewoodapts@gmail.com	75
10	1	Ridgewood Westridge Apartments	7450 W. Glenbrook Road	53223	westridgeridgewoodapts@gmail.com	75
11	1	The Meeting Place	10901 W. Donna Drive	53224	Lisa	96
12						846
18	2	Calvary Apts	1555 W. Chambers	53206	414-264-4533	72
14	2	Clare Central	3088-83 West Atkinson Ave	53206	Jennifer Westrick/ Jenniferw@stclaremgt.org	16
15	2	Deerwood Crossing	4195 W. Bradley Rd.	53209	Angela Smith/ deerwoodcrossing@acmgmtgroup.com	66
16	2	Glen Court Apts	6101 North Greenbay Ave	53209	Jennifer Bush/ Bill.glencourtapts@gmail.com	110
17	2	Green Court Apts	4185 West Schroder Drive	53209	Zach/Deby/ Agasca@metapts.com	123
18	2	New Hampton Gardens	4821 North 22nd Street	53209	Crystal/Vicky Townsend	188
19	2	Sherman Park Apt.	7245 N. 37th St.	53209	bthompson@godmanusa.com	68
20	2	Bradford Place	2323 E Bradford Place	53211	Bella	94
21	2	Surfow Bldgs-Jewish	2940 N Bartlett Ave	53211	Kim Adams/ Corffeo@jfmilw.org	88
22	2	Clarence Parrish-Melvin Battle Senior Housing	3131 -3161 N Martin Luther King Dr	53212	Jessie Weathersby	40
23	2	Clinton Rose	3045 N Martin Luther King Dr	53212	Carolyn Archie	
24	2	CR Parish Apartments	CR Parish- 3161 N. MLK Drive	53212	nyglawoodard@teammanagement.net	35
25	2	MJ Battle Apartments	3131 N. MLK Drive	53212	nyglawoodard@teammanagement.net	40
26	2	My Zion Ct. Yard Apts	2104 N. MLK Drive	53212	Lany	50
27	2	Park Hill Senior Housing	535 West Concordia Ave	53212	Kim/ Parkhill@acmgmtgroup.com	62
28	2	Congress Apts	3939 W National Ave	53215	Lillian	73
28						1125
30	3	Claire Towers	1546 S 29th Street	53214	Tammy Wergin/ tammyw@stclaremgt.org	25
31	3	Evergreen Square	3139 South 77th Street	53219	Judith Turner	36
32	3	Oak West Apts	11302 West Oklahoma Ave	53227	Doug	50
33						111
34	4	Golda Meir Apts	1567 North Prospect Ave	53202	Victoria Rubinshteyn	127
4	4	Pleasant View terrace	1027 East Pleasant Street	53202	Henry Moreno/ Rcarriere@sg-rc.com	48
4	4	The Willows	2201 North Cambridge	53202	Tammy Wergin	80
37	4	Brewery Point Apartments	1244 North 9th St.	53205	Vanessa.Giraldez@commonbond.org	
38	4	C.G. Robinson Place	2025 N. 15th St	53205	Charcora Palmer	25
39	4	C.G. Robinson Place	2020 N. 14th	53205	Charcora Palmer	50
40	4	Richardson Manor	1919 North 11th Street	53205	Wanda Eison/ Deborah.stephens@rhf.org	40
41	4	St. Marks Place	2025 N. 14th St	53205	Charcora	25
42	4	Waco Apts	1800 North 12th Street	53205	Lula Chambers/ mlblattner@presmgmt.com	143
43	4	Claire Heights	834 N 35th Street	53208		27
44	4	Braley Crossing	4375 W. Bradley Rd	53233	bradleycrossing@oakbrookcorp.com	60
45	4	State Street Apts	955 North 14th Street	53233	Estella Grant	52
46	4	William Passavant Apts	2195 W. State St	53233	A.collins@commonwealthco.net	52
47	4	WY Village East	835 North 23rd Street	53233	Angel/ Kayla@jomeia.com	57
48						786
49	5	Wimmer Communities	11077 W. Forest Home Ave	53130	Mary Zurowski	
50	5	Clare Meadows I	7700 S. 51st St.	53132	Mail to 7700 S. 51st St. Franklin 53132	135
51	5	Clare Meadows II	7760 S 51st St.	53132	Mail to 7760 S. 51st St. Franklin 53132	40
52	5	Clare Woods	3576 S 43rd Street	53220	Tammy Wergin/ tammyw@stclaremgt.org	32
53	5	Southgate Square	3775 & 3785 South 27th Street	53221	Judy Schaefer/ Mail to 3775 S. 27th st. 53221	373
54	5	Lexington Village	5000 S. 107TH Street	53228	Lexington@oakbrookcorp.com	120
55	5	Franklin Meadows	7704 South 51st.	53132	Vanessa.Giraldez@commonbond.org	
56						700
57	6	Clare Lakes	5051 South Lake Drive (Cudahy)	53110	Jennifer Westrick/ Jenniferw@stclaremgt.org	8
58	6	Evergreen Square-Cudahy	3717 E. Ramsey Ave	53110	Arthur Gasca/ Agasca@metapts.com	106
59	6	Oakbrook Corporation-Williamstown Bay Cudahy	3400 E. Ramsey Ave #111	53110	Roselle Mussomeli/ williamstown@oakbrookcorp.com	144
60	6	Washington Square-Cudahy	4816 S. Packard Ave	53110	Arthur Gasca/ Agasca@metapts.com	88
61	6	Booth Manor	150-180 W Centennial Drive-Oak Creek	53154	Sherri Benka	41
62	6	Bruce Manor	150-180 W Centennial Drive-Oak Creek	53154	414-762-2161	80
63	6	Centennial Apts	400 E Centennial Drive-Oak Creek	53154	Stacy Chaney/ ssanders@wimmerbrothers.com	97
64	6	The Courts	195 West Puetz Road	53154	Ellen Kleinham/ oakcreekmanager@gmail.com	127
65	6	Grant Park-South Milw.	2825 S. Chicago Ave	53172	Arthur Gasca/ Agasca@metapts.com	153
66	6	Winchester Village Apts.	2147 S. Winchester	53207	Kristy	56
67	6	Constant Meadows Senior Apts	3120 E. Norwich	53235	414-769-9257	100
68	6	Faircrest Apartments	1920 E. Tripoli Ave	53285	Barbara Jordan/ Ab@redstapartnersllc.com	43
						1043

COMMUNITY PARTNERS

Zone	Location	Address	Zip	contact information
1	New Creatures in Christ	2328 W. Capitol Dr.	53210	414-442-7265
1	Mc Govern Park Senior Center	4500 W. Custer Ave.	53218	414-527-0990
1	Bethesda Senior Center	2845 W. Fond du Lac Ave	53210	414-445-3109
1	Brown Deer Senior Center	7841 N. 47th St.	53223	414-357-7002
1	Elks Lodge	5555 W Good Hope Rd.		414-788-8889
1	Acelero - 78th St.		53216	
1	Acelero Learning Center	7901 N. 66th St.	53223	
2	Mt. Pilgrim	2700 W. Brown St.	53212	414-342-2034
2	Mt. Horeb Church	534-40 W. Center St.	53212	414-263-7676
2	Clinton Rose Senior Center	3045 N. Dr. Martin Luther King Dr.	53212	
2	Jewish Community Center	6255 N. Santa Monica Blvd.	53217	414-967-8249
2	Project Focal Point, Inc.	811 W. Burleigh St.	53206	414-372-1970
3	Asian American Senior Center	120 N. 73rd St.	53213	414-258-2410
3	Wauwatosa Senior Center	7300 W. Chestnut	53213	414-471-8495
4	Washington Park Senior Center	4420 W. Vliet St.	53208	414-933-2332
4	Indian Council of the Elderly	631 N. 19th St.	53208	414-933-1401
4	Milwaukee Christian Center	2137 W. Greenfield Ave	53204	414-645-5350
4	United Community Center	730 W. Washington St.	53204	414-649-2807
5	Wilson Park	2601 W. Howard Ave	53221	414-282-5567
6	Kelly Senior Center	6100 S. Lake Dr.	53110	414-481-9611
6	Beulah Briton Senior Center	2555 S. Bay St.	53207	414-481-2494/414-475-8538
6	Chester W. Grobeschmidt Senior Center	2424 15th Ave.	53172	414-768-8045
6	Acelero Learning - Cudahy	5885 S. Packard Ave	53110	



GREATER NEW BIRTH
"A GREAT CHURCH, GREAT PURPOSE, GREAT FUTURE"
BISHOP R.J. BURK, SENIOR PASTOR AND LADY PATRICIA BURK, PASTOR

March 16, 2015

Mr. George P. Hinton
CEO
Social Development Commission
4041 N. Richards Street
Milwaukee WI 53212

Dear Mr. Hinton,

The Greater New Birth Church is committed to providing space and resources to the Social Development Commission to operate Energy Assistance services at our site located at 8237 W. Silver Spring Ave in Milwaukee County. As a long time supporter and community partner, we look forward to the expansion to serve the community surrounding the church.

In this agreement we commit to providing space for the acceptance of Energy Assistance applications on an agreed schedule of Monday-Friday, starting October 1 through May 15, 2016 according to terms agreed to by the Church and SDC.

The Greater New Birth Christian Campus has an accessible facility and will be able to provide adequate parking for clients who arrive for services via direct access to a main highway and public transportation.

Sincerely,

Drina M. Lewis
Executive Pastor

GREATER NEW BIRTH CHURCH • 2207 WEST CENTER STREET • P.O. BOX 12346 • MILWAUKEE, WI 53212



Celebrating 40 Years 1975 - 2015

BOARD OF DIRECTORS

JOYCE APPEL

March 16, 2015

STEVE APPEL
CHAIRPERSON

Mr. George P. Hinton
CEO
Social Development Commission
4041 N. Richards Street
Milwaukee WI 53212

CYNTHIA BROWN

BARRY GIVENS,
TREASURER

Dear Mr. Hinton,

KENNETH GREEN

New Concept Self Development is committed to providing space and resources to the Social Development Commission to operate Energy Assistance services at our site located at Dr. Martin Luther King Jr. Community Center ("MLK Center") located at 1531 W. Vliet St. in Milwaukee County. As a long-time supporter and community partner, we look forward to the expansion to serve the community surrounding the center.

TIM LODUHA

W. CURTIS
MARSHALL

In this agreement we commit to providing space for the acceptance of Energy Assistance applications on an agreed schedule of 5 days/week for three workers starting October 1 through May 15, 2016.

FELESIA MARTIN

ERRILL MARTIN

Our facility has an accessible facility and will be able to provide adequate parking for clients who arrive for services via direct access to a main highway and public transportation.

DIANE ROBINSON

Sincerely,

Vanessa Johnson
Vanessa Johnson
Executive Director

MAVIS McCALLUM,
EMERITUS

TAWAUNA SWANGAN
FINANCIAL MANAGER

VANESSA JOHNSON
EXECUTIVE DIRECTOR



Greater Milwaukee
& Waukesha County

DR. MARTIN LUTHER KING, JR. COMMUNITY CENTER
1531 WEST VLIET STREET
MILWAUKEE, WISCONSIN 53205
P: (414) 344-5788 F: (414) 344-0423

WEBSITE: WWW.NCSDC-INC.ORG

HMONG/AMERICAN FRIENDSHIP ASSOCIATION, INC.

Celebrating 32 Years of Service to the Asian American Community



March 16, 2015

Mr. George P. Hinton
CEO
Social Development Commission
4041 N. Richards Street
Milwaukee WI 53212

Lo Neng Kiatoukaysy,
Executive Director

Dear Mr. Hinton,

Community Organizing
Museum & Gift Shop
24 Hour Bilingual Crisis
Hotline
Elderly Services

The Hmong American Friendship Association is committed to providing space and resources to the Social Development Commission to operate Energy Assistance services at our site located at 3824 W Vliet ST in Milwaukee County. As a longtime supporter, community partner and former Energy site, we look forward to serving the community surrounding the center.

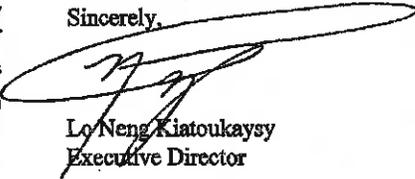
SEA DV & SA Programs
Food Pantry
Homebuyers Counseling
Hmong Dance/ Music
Classes
Interpretation/
Translation

In this agreement we commit to providing space for the acceptance of Energy Assistance applications on an agreed schedule of 5 days/week, starting October 1 through May 15, 2016.

Friendship Garden Adult Day
Care Center
Job Placements
Youth Program

The Hmong American Friendship Association has an accessible facility and will be able to provide adequate parking for clients who arrive for services via direct access to public transportation.

Sincerely,


Lo Neng Kiatoukaysy
Executive Director

CDBG

•3824 West Vliet Street Milwaukee WI, 53208 •Phone: 414-344-6575 •Fax: 414-344-6581 •www.hmongamer.org

POVERTY STATUS OF INDIVIDUALS BY ZIP CODE - 2013-14
Based on Milwaukee County Stats

		Population/NPC		Eligible HH	% Eligible	HH App 2013	% Served	Served via HH/PP	% Served HH/PP 2014	Crisis 2014	% Served
53210	1	27,592	+/-1,391	9,889	35.8%	4,021	40.7%	250	6.22%	1,335	33.2%
53216	1	31,939	+/-1,304	12,529	39.2%	4,730	37.8%	309	6.53%	1,260	26.6%
53218	1	40,123	+/-1,397	14,092	35.1%	5,169	36.7%	272	5.26%	1,484	28.7%
53222	1	25,996	+/-890	11,132	42.8%	1,221	11.0%	121	9.91%	236	19.3%
53223	1	27,811	+/-1,228	12,222	43.9%	2,207	18.1%	145	6.57%	482	21.8%
53224	1	22,740	+/-1,175	7,781	34.2%	1,930	24.8%	120	6.22%	511	26.5%
53225	1	23,515	+/-1,282	9,617	40.9%	2,650	27.6%	155	5.85%	780	29.4%
		158,216		72,283	38.7%	21,818	28.4%	1,372	6.26%	6,088	27.8%
53206	2	28,911	+/-1,649	9,432	32.6%	4,968	52.7%	345	6.94%	1,783	35.9%
53209	2	44,874	+/-1,555	18,841	42.0%	6,430	34.1%	365	5.68%	1,852	28.8%
53211	2	32,877	+/-839	15,460	47.0%	421	2.7%	19	4.51%	39	9.3%
53212	2	30,720	+/-1,206	12,722	41.4%	3,558	28.0%	178	5.00%	1,048	29.5%
53217	2	28,749	+/-493	11,883	41.3%	243	2.0%	14	5.76%	34	14.0%
		166,334		68,338	41.1%	15,626	22.9%	311	5.90%	4,734	30.4%
53213	3	25,567	+/-546	11,626	45.5%	438	3.8%	54	12.33%	74	16.9%
53214	3	34,398	+/-1,016	15,688	45.6%	1,902	12.1%	202	10.62%	396	20.8%
53219	3	35,275	+/-1,030	15,226	43.2%	1,592	10.5%	146	9.17%	295	18.5%
53226	3	18,461	+/-601	8,063	43.7%	267	3.3%	33	12.36%	46	17.2%
53227	3	22,301	+/-728	10,945	49.1%	774	7.1%	98	12.66%	122	15.8%
		135,897		61,848	45.3%	5,575	8.1%	339	10.72%	833	18.8%
53202	4	21,783	+/-629	14,615	67.1%	481	3.3%	40	8.32%	38	7.9%
53203	4	1,103	+/-144	618	56.0%	49	7.9%	1	2.04%	13	26.5%
53204	4	40,956	+/-1,319	12,802	31.3%	4,344	33.9%	164	3.78%	1,349	31.1%
53205	4	9,412	+/-751	3,566	37.9%	1,409	39.5%	86	6.10%	389	27.6%
53208	4	32,172	+/-1,374	12,159	37.8%	3,796	31.2%	203	5.35%	1,116	29.4%
53215	4	58,411	+/-1,496	19,223	32.9%	5,207	27.1%	182	3.50%	1,252	24.0%
53233	4	10,022	+/-768	5,249	52.4%	987	18.8%	61	6.18%	234	23.7%
		172,898		68,236	39.2%	16,273	23.8%	737	4.53%	4,811	27.0%
53129	5	14,068	+/-34	6,044	43.0%	266	4.4%	41	15.41%	29	10.9%
53130	5	7,652	+/-61	3,332	43.5%	125	3.8%	12	9.60%	15	12.0%
53132	5	32,535	+/-338	13,327	41.0%	403	3.0%	45	11.17%	155	38.5%
53220	5	25,599	+/-981	11,778	46.0%	987	8.4%	130	13.17%	142	14.4%
53221	5	37,332	+/-1,260	15,858	42.5%	1,906	12.0%	127	6.66%	272	14.3%
53228	5	14,414	+/-628	6,294	43.7%	290	4.6%	26	8.97%	56	19.3%
		131,602		56,633	43.0%	3,872	7.0%	591	9.58%	688	16.8%
53110	6	18,221	+/-78	8,083	44.4%	958	11.9%	109	11.38%	203	21.2%
53154	6	33,977	+/-179	14,064	41.4%	738	5.2%	65	8.81%	-	0.0%
53172	6	20,854	+/-110	9,043	43.4%	843	9.3%	88	10.44%	165	19.6%
53207	6	35,923	+/-799	15,960	44.4%	1,383	8.7%	83	6.00%	275	19.9%
53235	6	9,208	+/-112	4,464	48.5%	396	8.9%	33	8.33%	41	10.4%
53295		71	+/-77		0.0%	-	-	-	-	-	-
		118,234		51,614	43.6%	4,216	8.4%	176	8.75%	684	15.8%
Total		625,357		287,821		62,985		4,331		17,521	

Notes: The results come from a small sample, summed over a five year application of the American Community Survey. Error terms are important when comparing one zip code to another, or evaluating trends from prior periods.

Nonprofit Center of Milwaukee

Updated: 3/27/2015, 12:52 PM



Social Development Commission

ABOUT US PROGRAM FOUNDATION DONATE/VOLUNTEER PARTNERS EVENTS MEDIA XGIS

Programs > Support Services > Energy Assistance

Energy Assistance

[Learn more about Energy Assistance](#)

*** Evening & Weekend appointments are available **
(only available to those who are full-time, first shift workers or full-time students
living in a household without another able-bodied adult)**

[Make an appointment online](#)

Crisis Assistance Policy is subject to change annually without notice.

SDC Employees, Commissioners and/or former SDC employees who have been employed at SDC within the last 3 years or less must be seen by a Energy Assistance Manager, Supervisor or Lead in order to have their applications processed.

Energy Assistance Checklist - What do I need to bring to for Energy Assistance?

Energy assistance provides low-income residents with utility bill payments assistance for fuel costs, emergency furnace repair and replacement, and restoration of utility services. The program provides access to the following services:

- Regular energy assistance to help with your annual home energy costs.
- Crisis assistance includes: restoration of utility services, reconnection of disconnections and furnace repair or replacement. (Note: furnace repair or replacement is only available when home is currently occupied). It is offered when funds are available.
- Referrals for other heating related services.

Please note that if you are experiencing a no-heat situation, please contact our office at 414.906.2800 during normal business. To ensure timely response you must listen to the prompts carefully. If you experience a loss of heat after 3:00pm daily or on the weekend, please call 2-2-2.

It is intended to help pay a portion of heating costs and is not intended to pay the total annual heating cost. The amount of heating assistance benefit varies according to household size, income level, and household heating costs.

What you must bring to determine program eligibility

- A photo ID for first time applicants
- Proof of all income sources for the entire household's gross income for the previous three months (i.e., unemployment, child support, wages, pension, etc.) Seasonal employees will require the prior year's entire 1040 tax forms
- Social Security numbers and dates of birth for all household members (starting Sept. 2014)
- Current energy bill (gas/electricity)
- If your heat is included with your rent: Rent certificate or statement from landlord confirming heat included in rent

[What To Bring - English](#) / [Español](#) / [Hmong](#)

Programs

- Asset Development
- Education & Training
- Family Strengthening
- Support Services
- Energy Assistance
- Prescription Advocacy & Referral Service (PARS)
- Project GAIN
- SDC Food Program
- For Your Information

SDC Energy Assistance sites:

****Please note that tickets are distributed daily at each site approximately 30 minutes prior to the site opening.****

4041 N. Richards Street (53213)
Hours of Operation: Mon. - Fri., 7:30am - 4:30pm
(414) 906-2800

2968 E. Chase Avenue (53207)
Hours of Operation: Mon. - Fri., 7:30am - 4:30pm
(414) 906-2800

6949 N. Taulonia Avenue (53209)
Hours of Operation: Mon. - Fri., 7:30am - 4:30pm
(414) 906-2800

Community Advocates
728 N. James Lovell St.

For more information on locations and income guidelines refer to our [SDC Energy Assistance Flyer](#) (pdf) - [English](#) - [Spanish](#) - [Arabic](#) or Call (414) 906-2800.



Making a difference today, while investing in tomorrow

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Wisconsin Home Energy Assistance Program

What is it? How Does it Work?

Energy Assistance is a one-time payment during the heating season (October 1—May 15). The funding pays a portion of energy costs, but the payment is not intended to cover the entire energy costs of a residence. The amount of the energy assistance payment 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's energy supplier.



2014-2015 Gross Income Guidelines
Household total annual gross income shown below

Family Size	1 Month	3 Months	Annual
1	\$2,096	\$6,288	\$25,151
2	\$2,741	\$8,223	\$32,890
3	\$3,386	\$10,157	\$40,628
4	\$4,031	\$12,092	\$48,367
5	\$4,676	\$14,027	\$56,106
6	\$5,320	\$15,961	\$63,844
7	\$5,441	\$16,324	\$65,295
8	\$5,562	\$16,687	\$66,746

What to bring:

(Additional information may be required for other circumstances)

1. **Photo ID** (Recommended; Mandatory for 1st time applicants);
2. **Social Security Numbers and Dates of Birth** for everyone in your household;
3. **Current gas, electric or oil energy bill** (lease or a letter from your landlord with name & phone number, if your heat is included in your rent);
4. **Verification of gross income** (before taxes or deductions) for everyone in your household for the previous three months
 - Pay stubs/wage statements for gross income, workers compensation or unemployment compensation;
 - 1099 or current award letters for pension, Social Security benefits, VA benefits or child support (bank statements are NOT accepted as verification of benefits);
 - Most recent taxes or 1099 forms for interest, dividends or annuities;



5 FACTS About your We Energies Bill

FACT 1: Always open and check your bill every month. Check:

- The due date
- The amount due
- Monthly messages (located at the bottom of your bill)

FACT 2: To lower cost of monthly payment plan, monitor & lower your gas & electric usage. Payment plans are based off usage.

FACT 3: Don't wait until you receive a disconnection to contact We Energies.

FACT 4: To avoid disconnection, you **MUST** have agreed upon arrangements with We Energies. MPO - Minimum payment option does not permanently stop your disconnection.

FACT 5: Don't stop making payments during the winter months.



PARTNERS
FOR PROGRESS



LA CASA
DE LOS ALIADOS



IMPACT
A Stronger Voice. For Good.



home energy+

Details on how & where to apply on other side

Issued 8/2014

*All energy sites are handicapped accessible and have a capacity limit.
All sites closed on major holidays.*



To schedule an appointment at any of the
SDC locations:

Call 414-906-2800
or visit www.cr-sdc.org

To schedule an appointment at
Community Advocates:

Call 414-270-6954
or visit www.communityadvocates.net

**For More Info or
Help After Hours
Dial 2-1-1**

**Northwest Side
SDC**

6848 N. Teutonia
Mon. – Fri. 7:30 am to 4:30 pm
Evenings & Saturdays: By
Appointment Only

***Evening & Weekend
Appointments
Available During Peak
Times**

**South Side *NEW LOCATION*
SDC**

2968 S. Chase Avenue
Mon. – Fri. 7:30 am to 4:30 pm
Evenings & Saturdays: By
Appointment Only



**East Side
SDC**

4041 N. Richards
Mon. – Fri. 7:30 am to 4:30 pm
Evenings & Saturdays: By
Appointment Only

**Central/Downtown
Community Advocates**

728 N. James Lovell
Mon. – Thur. 9:00 am to 3:30 pm
Friday: 9:00 am to 3:00 pm
Limited Evening & Weekend Hours*

Help is also available with other programs & services including:

- Energy Conservation
- Financial Literacy
- Crisis Assistance
- Weatherization
- Payment Plans
- Furnace Repair

Energy Assistance Program Info on other side



2014-2015 WISCONSIN HOME ENERGY ASSISTANCE PROGRAM CHECKLIST

To avoid unnecessary delays, the following checklist will help you prepare for your application process. It is important that you provide the documentation required. Agencies may not be able to directly obtain income and Social Security information.

Photo Identification

Be prepared to show a photo identification card, such as:

- Driver's license; OR
- Government issued photo ID; OR
- Other photo ID (employer ID for example)

Social Security Number (SSN)

Be prepared to provide the Social Security Number (SSN) for every person in your household.

Citizenship

If you or any member of your household is not a citizen of the United States, provide:

- Alien status card with USCIS number, and
- Immigration Papers.

Proof of Residency

To verify that you live in Wisconsin and the county/tribe on the application, provide:

- Wisconsin driver's license with current address; OR
- Copy of utility bill with current address; OR
- Copy of real estate tax bill; OR
- Other third-party evidence of your residential status.

Heating Costs

If your heat is provided by a Class A utility (We Energies, Wisconsin Public Service, MG&E, Alliant, or Xcel), provide your fuel account number. If your heat is provided by another company, provide evidence of your household's primary heating costs for the last 12 months OR from September 1 through last August 31:

- A statement from your fuel dealer listing your heating costs for that period; OR
- Copies of your heating bills for that period. If you have heating bills for more than one heat energy source, provide copies of all heating bills.

Electric Costs

The Public Benefits program assists eligible households with non-heating electric costs (i.e. lighting and water heat). If your electric service is provided by a Class A utility (We Energies, Wisconsin Public Service, MG&E, Alliant, or Xcel), provide your electric account number. If your electricity is provided by another company, to determine if you are eligible to receive a benefit for your non-heating electric energy costs, provide:

- Copies of your electric bill for the same time period as your heating bill.

Landlord

If you rent, provide:

- The name, address and telephone number of your landlord or building manager (the person to whom you pay your rent); OR
- Your rental agreement (lease).

Child Support (CS) Paid

If you pay child support, provide evidence of the support you paid during the 3 months prior to the month of application. Provide:

- Copies of your cancelled checks; OR
- A printout from the CS agency or from the WI Support Collections Trust Fund showing the amount of CS paid in the 3 months prior to the month of application.

Dividends and Interest Income

Provide evidence of your household's interest and dividends income for the last 12 months:

- Last year's 1099; OR
- Bank statements; OR
- Statements from companies that paid dividends.

Income

Provide evidence of your entire household's gross income for the 3 months prior to the month of application. See the back of this page for more details regarding what to provide. Some household members may be required to provide annual income information. (See reverse for specifics.)

2014-2015 Home Energy Plus Income Guidelines

Household Size	Annual Income
1	\$6,288
2	\$8,223
3	\$10,157
4	\$12,092
5	\$14,027
6	\$15,961
7	\$16,324
8	\$16,687

PLEASE PROVIDE THE FOLLOWING PROOF OF INCOME (for the 3 months prior to the month of application, unless stated otherwise):

- Wage Income:**
- Pay stubs; OR
 - Employer payroll statement.
- Self-Employment Income:**
- Your most recent federal income tax form 1040 including all Schedules; OR
 - Your personal records for self-employment income and expenses for the past 12 months.
- Farm Income:**
- Your most recent federal income tax form 1040 including Schedule F; OR
 - Your personal records for farm income and expenses for past 12 months.
- Unemployment Compensation:**
- A printout from the unemployment office, verifying the checks you have received; OR
 - Copies of each unemployment check you received in the 3 months prior to the month of application.
 - If seasonal, copies of 1099-G for last tax year.

Land Contract Income:

- The Land Contract and amortization schedule of payments; OR
- Schedule B.

Rental Income:

- Your most recent federal income tax form 1040 including Schedule E; OR
- Rent receipts; OR
- Your records of rental income and expenses for the past 12 months.

Supplemental Security Income (SSI):

- SSI award letter; OR
- SSI check stubs; OR
- Bank statements, for state SSI only.

Social Security and Social Security Disability Insurance (SS and SSDI):

- SS award letter; OR
- SSA-1099; OR
- Social Security Administration (SSA) benefit statements.

Pensions, Annuities, IRAs:

- Check stubs; OR
- 1099-R; OR
- Gross dollar amounts from statements covering a 12-month period.

Child Support (CS) Payments Received:

- CS debit card statement; OR
- A printout from the CS agency or from the WI Support Collections Trust Fund showing the amount of CS received.

Income for Seasonally Employed

- (Including but not limited to construction worker, teacher, etc.)
- Copy of your 1040 including all W-2s and 1099s.

Temporary Assistance for Needy Families (TANF/ Wisconsin Works (W2) Benefits:

- Check stubs; OR
- Award letters; OR
- A letter from the TANF/W2 agency stating your assistance amount.

Veteran's Benefits:

- The most recent letter from the Veteran's Affairs stating your monthly benefits; OR
- Check stubs

Additional Income Types:

- Such as: Disability Tribal per capita Worker's Compensation
- Stubs or statements from the checks.



Home Energy Plus is administered by the Wisconsin Department of Administration's Division of Energy Services. Home Energy Plus programs include the Wisconsin Home Energy Assistance Program (WHEAP) and the Weatherization Assistance Program. These programs help income-eligible households with energy bill payments and energy efficient measures that reduce energy usage.

For more information:
1-866-HEATWIS (432-8947)
www.homeenergyplus.wi.gov

Wisconsin Department of Administration
Division of Energy Services
DOA-9556 (R7/2014)

Complaint Procedure

- Before or in lieu of filing a written complaint, you may discuss your concerns with a member of SDC's Quality Assurance Division who will, through mediation, conflict resolution, or other process attempt to resolve the concerns
- If appropriate, you may report improper conduct of an SDC employee by using SDC's "policy on Reporting and Investigating Improper Conduct," a copy of which will be provided upon your request; the report may be oral or may be made on SDC's "Consumer/Client Complaint Grievance Form," a copy of which also will be provided to you upon request
- You may also file a complaint with any of the offices listed under "Grievance Contacts". Upon request, a member of SDC's Quality Assurance Division will assist you, on the basis of the program in which you participate or on the basis of the service you receive, in identifying the office with which your complaint may be filed



Grievance Contacts
Social Development Commission

SDC Executive
 Quality Assurance Division
 Milwaukee, WI 53212
 (414) 906-2700

State of Wisconsin:

Wisconsin Department of Children and Families
 201 E. Washington Ave., 2nd Floor
 PO Box 8916
 Madison, WI 53708-8916
 (608) 266-5335

Wisconsin Department of Health Services

Office of Civil Rights Compliance
 1 W. Wilson, Room 561
 PO Box 7850
 Madison, WI 53707
 (608) 266-9372

United States:

U.S. Department of Health and Human Services
Office of Civil Rights-Region V
 233 N. Michigan Avenue
 Chicago, IL 60601
 (312) 886-2359

U.S. Department of Agriculture Regional Civil Rights Director
 77 W. Jackson Blvd., 20th Floor
 Chicago, IL 60604-3591
 (312) 353-6657



Client Rights and the Complaint Procedure

For Clients Receiving Services from Community Relations - Social Development Commission.



Milwaukee, Wisconsin 53212
 P: 414.906.2700 • F: 414.906.2719 • www.cr-sdc.org



009/2012





Client Rights and the Complaint Procedure

All clients receiving services from SDC have the following rights as explained in this brochure. If you have any questions please see an SDC staff member.

SDC staff respects you and we ask you to show the same respect to us. We expect you to be polite. SDC staff will not tolerate rude or abusive behavior.

Personal Civil Rights

- You have the right to be treated fairly and to not be discriminated against based on race, national origin, gender, age, religion, disability, or sexual orientation
- You have the right to be treated with dignity and respect. At no time will you be subject to any form of abuse including, but not limited to, physical abuse or punishment, psychological abuse, retaliation, humiliation, neglect, and financial or other exploitation
- You have the right to have SDC staff make fair and reasonable decisions including service and benefit decisions. You have the right to participate in all service decisions
- You have the right to reasonable accommodation if you have a disability and feel you need accommodation to access program services

Program Service Rights

- You have the right to be provided timely and quality services for which you are eligible
- You have the right to participate in all service decisions
- You have the right to know the name of anyone working with you
- You have the right to make your own decisions and set your own goals
- You have the right to receive assistance in making decisions and setting goals
- You have the right to be informed of any costs of services and have any costs explained to you
- You have the right to refuse services or any specific services, and the right to be informed of the consequences resulting from a refusal of such services
- You have the right to refuse participation in any survey or research conducted at SDC.
- You have the right to terminate services at any time
- You have the right to confidentiality. SDC respects the confidentiality of your personal information and the services you receive



Language Rights

- SDC is committed to providing equal opportunity in all programs and services to ensure full compliance with all civil rights laws including persons with Limited English Proficiency (LEP). It is the policy of SDC to provide language access services to populations of persons with LEP.
- You have the right to ask for oral and/or written translation into a language other than English whenever you access programs and services
 - You have the right to qualified interpreter service at no cost to you

Complaint Rights

- If you believe that either your personal civil rights or your program service rights have been violated, you have the right to file a complaint without fear of interference or retaliation
- If you file a complaint with SDC, you have a right to a written response





SDC Energy Assistance Client Surveys

One of the measurements regarding performance of the Energy Assistance (EA) Program is to provide survey results. The Quality Assurance Department distributed customer satisfaction surveys at all three locations to monitor information relating to the customer perception and to ensure that the EA program provides quality service delivery. The survey result listed below is based from the following question.

How was my customer service today? Excellent, good, and poor in the following areas:

- ❖ Customer Service
- ❖ Receptionist/Screeners professional and friendly
- ❖ Energy Staff professional, friendly and helpful
- ❖ Wait time – more than 15-20 minutes

Throughout the 2014 Energy season, the QA unit received and analyzed a total of 1,492 surveys. Of those 1,492 surveys received:

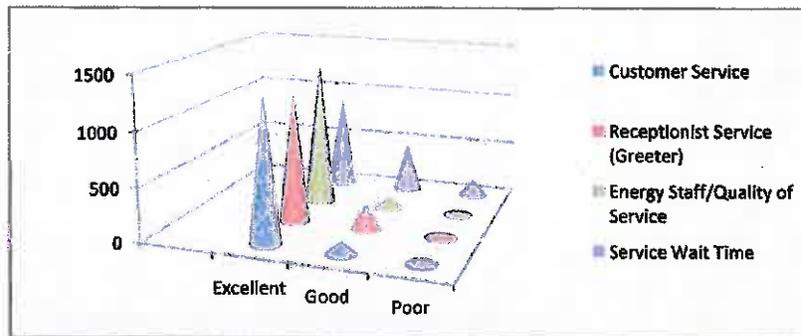
89% of the clients stated that the programs provided excellent customer service, whereas, 8% of the clients stated that the customer service is good and 3% stated that the customer service is poor.

In areas of professionalism and friendliness concerning the receptionist/screener, 82% of the client stated that the receptionists as well as the screeners exhibited professionalism and they were very friendly. 15% stated that their professionalism/friendliness was good and 3% stated that there disposition was poor.

Furthermore, the energy staff resulted in 91% of the clients stated that the staff were very helpful, professional and friendly, while, 7% stated that the staff was helpful, friendly and professional and 3% identified the staff was not helpful, friendly, or professional.

Lastly, clients expressed their experience with the wait time to be seen for service. Of the 1492 surveys received, 59% stated that the wait-time was excellent, meaning less than 15 minutes wait, 7% stated that the wait time was good however 3% stated that the wait time was poor meaning the client waited longer than 30 minutes before seen.

The chart listed below illustrates the results regarding customer service for the 2014 Energy Assistance program.



Overall, the Energy Assistance program is doing a great job in providing customer service. A concern of the QA Department is the low survey response from the clients.