

**NOTICE OF REQUESTS FOR PROPOSALS (RFP)**

**COMMUNITY RESOURCE DEVELOPMENT PLAN (CRDP)**

**FISCAL YEAR 2023-2024**

**Summary of Project**

San Gabriel/Pomona Regional Center (SG/PRC) in collaboration with Eastern Los Angeles Regional Center (ELARC), Frank D. Lanterman Regional Center (FDLRC), South Central Los Angeles Regional Center (SCLARC), Westside Regional Center (WRC) is soliciting proposals for the following CRDP contracted service:

**Development Type:** Housing Access Services

**Service:**  Housing readiness assessment tool

**Project #**: SGPRC-CRDP 2324-5

**Posting Date**: March 1, 2024

**Deadline**: April 1, 2024 by 4 PM (PST)

**Location:** To be used for individuals served in Los Angeles County Regional Centers

**Award:** $150,000

**Development Timeline:** The housing readiness assessment tool should be ready to use by individuals served by the Los Angeles County Regional Centers no later than January 17, 2025.

**BACKGROUND**

The San Gabriel/Pomona Regional Center (SG/PRC) in collaboration with the six (6) other Los Angeles County Regional Centers recognize the importance for individuals with intellectual and developmental disabilities to access affordable, stable, and quality housing. These individuals often are not prepared to rent, lease, or own homes or apply for public housing programs, because they may not be aware of the programs, have the rental or credit history, and/or be able to provide the documents needed to apply for available housing or housing programs they may qualify for in their area.

**SERVICE DESCRIPTION**

The desired outcome for this project is an online housing readiness assessment tool. The tool will be easy to use, in plain language, and designed to be accessible to individuals with a disability and or impairment. The tool will be translated into the following languages Arabic, Armenian, English, Hmong, Japanese, Korean, Simplified Chinese, Spanish, Traditional Chinese, and Vietnamese. The tool shall be compatible with computers, tablets, and mobile devises (android and iOS). The housing readiness assessment tool will be available to meet the needs of individuals served by the 7 LA County RCs.

The tool will be used to assist individuals with intellectual and developmental disabilities and their families assess the following: their housing needs both short and long-term; their ability to rent, lease, or own a home; their readiness and ability to apply for public housing programs; and identify potential public housing programs based on their current or preferred ZIP code in Los Angeles County. After the housing readiness assessment tool is completed, a report will be generated that will be used by the individual and their family, vendored service providers (Supported Living SLS and Independent Living Skills program (ILS), Coordinated Family Supports, Housing Access Programs), and/or Service Coordinator to assist someone in pursuing their housing goal, whether short term or long term. With the permission of the individual or their legal representative, the tool should also be able collect data that will be used by the LA County Regional Centers to advocate with Los Angeles County and local housing authorities for current and future housing developments. The data will also be used to apply by the Los Angeles County Regional Centers to apply for funding from the California Department of Developmental Services (DDS) or other local, state, and federal funding.

**GENERAL REQUIREMENTS**

Applicants must document their assets and liabilities, wages, and credit line using Attachment D – Sample Financial Statement and if requested provide necessary information for verification. If selected as a finalist, the applicant will be requested to demonstrate fiscal responsibility by submitting two (2) complete fiscal years and current fiscal year to date financial statements that detail all current and fixed assets and current and long-term liabilities and submit a budget.

**Deadline of Submission:** Proposals must be received at SG/PRC by 4:00 p.m. on April 1,2024.

Applications that are submitted after the deadline or that are incomplete, or proposals that do not meet the basic requirements will be disqualified. No proposals will be returned.

This RFP does not commit SG/PRC or any of the other LA County Regional Centers to procure or contract for services or support. SG/PRC may elect to fund all, part, or none of the project, depending on funding availability as approved by the Department of Developmental Services (DDS) and the quality of the proposals received.

**APPLICANT QUALIFICATIONS**

The following qualifications will be sought in a potential provider and will be assessed by evaluating and applicant’s proposal, and responses to interview questions, if applicable. For finalists, assessment of these qualifications will also include the collection and evaluation of additional information utilizing, but not limited to, the evaluation procedures listed below:

**Qualifications Sought in a Provider**

Applicant must demonstrate the following:

* Experience working with populations with disabilities. Preferably individuals with developmental disabilities or special needs and housing instability.
* A proven history of positive working relationships with the community, applicable government agencies as state, county, and city housing authorities, and Department of Children and Family Services. If the applicant is a current vendor of a regional center, the applicant must be in good standing with the regional center and any applicable licensing agency.
* Experience assisting individuals residing in Los Angeles County access affordable housing benefits such as Tenant-Based Voucher Rental Assistance Programs, Term-Limited Lease Assistance Programs, Streamlined Lease Assistance Programs, Project-Based Voucher Programs, Public Housing Programs, Pilot Homeless Programs, and Special Purpose Voucher Programs for Specific Housing Types.
* Experience providing culturally relevant services.
* Experience providing individualized, strength-based assessments and creatively offering services and resources to best meet people’s needs and choices.
* Experience working on housing Identification and/or landlord engagement.
* A proven history in the area of project development, including the ability to complete projects, meet project timelines and manage a project of this size and scope.
* A proven history of financial responsibility, stability, and soundness.
* The administrative capacity to complete the project in a timely fashion.

Both not-for-profit and proprietary organizations are eligible to apply. Employees of regional centers are not eligible to apply. Applicants must disclose any potential conflicts of interest per Title 17, Section 54500. Applicants, including members of governing boards, must be in good standing in regard to all services vendored with any regional center. The successful applicant will work with SG/PRC to develop a rate which will include, but is limited to, preset salary ranges for software developers, web designers, programmers, and translators.

Successful applicants to this RFP project must adhere to the RFP writing guidelines outlined in this RFP and complete each attachment enclosed in this RFP.

The selected service provider will be required to be vendored by the appropriate regional center pursuant to California Code of Regulations, [Title 17 § 54310](https://casetext.com/regulation/california-code-of-regulations/title-17-public-health/division-2-health-and-welfare-agency-department-of-developmental-services-regulations/chapter-3-community-services/subchapter-2-vendorization/article-2-vendorization-process/section-54310-vendor-application-requirements).

Contracts between SG/PRC and the selected service provider will include the following:

* Holding the vendor accountable for the expenditure of funds consistent with the contract terms and for program outcomes;
* In the event a project cannot be completed within the approved timeframe, the start-up funds must be returned to the State;

Upon completion of the project and the reconciliation of the contract funds, if SG/PRC determines that the contract amount has not been fully expended, contracted funds will be recouped by SG/PRC and returned to the State.

The provider is required to keep receipts, cancelled checks, and financial data for 3 years from date of contract.

All materials produced as a result of this project including the housing readiness assessment tool will become the property of the state of California and will be used by individuals with intellectual and developmental disabilities and served by the seven (7) Los Angeles County regional Centers

**APPLICANT ELIGIBILITY & RESTRICTIONS**

**Eligibility**

Any individual, partnership, corporation, association or private-for-profit or not-for-profit agency may submit a proposal.

* For partnership submissions, all partners should have full knowledge of the contents of the proposal submitted and must demonstrate commitment to the project during start-up as well as on-going operations.
* Applicants, including members of the governing board, must be in good standing in regard to all services vendored with any regional center.

Applicants that integrate the following best practices in their proposal:

* + Cultural and Linguistic Competence
	+ Equity
	+ Housing First
	+ Person-Centered Thinking
	+ Landlord Engagement and Retention

**Ineligibility**

Under the following conditions, an individual or entity is ineligible to be a regional center vendor, and therefore may not submit a proposal.

1. **Conflict-of-Interest:** Any individual or entity that has a conflict-of-interest as established in DDS Regulations, Title 17, Sections 54314 and 54500 et seq., unless a waiver is permitted and obtained, including:
	* Regional center employees, board members, and their family members.

**SELECTION PROCEDURES**

All proposals received by the deadline will undergo a preliminary screening. Late and/or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.

SG/PRC staff and representatives from the other six (6) LA County Regional Centers will seat the RFP Selection Committee. The evaluation process will include individual committee member evaluation and rating for each proposal, followed by committee discussion and ranking of proposals.

Proposals will be reviewed and evaluated for:

* Completeness and responsiveness of the proposal;
* Relevant experience and qualifications of the applicant;
* Reasonableness of timeline and cost to complete each project;
* Demonstrated financial responsibility, stability, and soundness of the applicant.

Proposals may be eliminated from further consideration due to inconsistency with state and federal guidelines, failure to follow RFP instructions, incomplete documents, or failure to submit required documents.

In addition to evaluating the merit of the proposal, applicants will be evaluated and selected based on previous performance, including timely completion of projects and a history of cooperative work with the regional center. (Please refer to the section titled Applicant Qualifications for details.)

After preliminary rating and ranking of proposals, interviews may be scheduled with finalists, particularly if two (2) or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists. All finalists will be required to complete and submit a budget and financial statement(s). (Please see section titled Applicant Qualifications for details.).

The final selection of the RFP Selection Committee is not subject to appeal. All applicants will receive written notification of SG/PRC’s decision regarding their proposal and an announcement of the applicant awarded the project will be posted on the Center’s web site: [www.sgprc.org](https://www.sgprc.org/). All applicants will receive notification of SG/PRC’s decision regarding their proposal.

Additional information may be required from the selected applicant prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract.

SG/PRC reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need.

In the event that no proposal is selected, SG/PRC may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.

**RESERVATION OF RIGHTS**

SG/PRC reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. SG/PRC may, at our sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. SG/PRC reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. SG/PRC reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of SG/PRC. It does not commit SG/PRC to award any grant.

**COSTS FOR PROPOSAL SUBMISSION**

Applicants responding to the RFP shall bear all costs associated with the development and submission of a proposal.

**FORMATTING REQUIREMENTS FOR THE PROPOSAL**

Applicants must adhere to the following formatting requirements when submitting the proposal application:

* All submissions must be type written using 12-point Times New Roman or Arial font and sent as an electronic version to: commsrvs@sgprc.org and ttravis@sgprc.org.
* An email acknowledgement of each submission received will be sent to the applicant.
* Attachments/Forms must also be type written using 12-point Times New Roman or Arial font. Include additional pages.
* All proposals must be complete and page numbered.
* Questionnaire must be type written in 12-point Times New Roman or Arial font.
* The “Application/Proposal Coversheet” (see Attachment – A) must be the first page of the proposal.
* As applicable, include appendices for documents, such as resumes, certificates, curricula, schedules, letters of recommendation, letters of support from agencies, consultants expected to provide program services, etc.
* Fax copies will NOT be accepted.
* Submissions will NOT be returned.
* No proposals will be accepted after the deadline.

**INQUIRIES/REQUEST FOR ASSISTANCE**

Additional inquiries regarding the application or requesting technical assistance should be directed to:

San Gabriel/Pomona Regional Center

Attn: Tim Travis, Associate Director, Community Services

75 Rancho Camino Dr.

Pomona, CA 91766

(909) 710-8831

ttravis@sgprc.org

Technical assistance is limited to information on the requirements for preparation of the application packet.

**Timeline**

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| March 1, 2024 | Request for proposal release |
| April 1, 2024 | Deadline for receipt of proposals |
| April 2- April 12,2024 | Evaluation of proposals by selection committee |
| April 15-April 17, 2024 | Interviews with finalists, if necessary |
| April 18, 2024 | Notice of selection mailed to applicants |
| June 21, 2024 | Start-up contract signed |
| June 28, 2024 | Notification of project award posted on SG/PRC website |

**SUBMISSION INSTRUCTIONS & APPLICATION**

Please use the following application to submit your proposal. Please check the boxes, and provide information as applicable and requested. In addition, please complete and attach the identified Attachments (A-F) in Section 1. For Sections 2-13 provide responses in the provided box. If you are providing additional information or attachments, please identify the attachment in the response and label the attachment with the Section number being responded to.

**Proposal Content and Service Summary Content Guidelines**

1. Please include all information requested below and submit your proposal in the same order. Check each box to confirm that the item is included in the proposal. Each proposal must be comprised of the following components:
	1. [ ]  Application/Proposal Coversheet – Attachment A
	2. [ ]  Statement of Obligation – Attachment B
	3. [ ]  Comparable Project(s) Listing – Attachment C
	4. [ ]  Financial Statement – Attachment D
	5. [ ]  Budget Form for Start-up Costs – Attachment E
	6. [ ]  DS1891 Applicant Disclosure Form – Attachment F
	7. [ ]  Guidelines for the Use of Start—Up Funds – Attachment G, is for applicant’s reference.
2. **Mission, Vision and Value (MVV) Statements**:

Provide the agency MVV statements and how these were developed for your agency. Include the curriculum components and strategies that you will use to develop the housing readiness assessment tool.

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1. **Background and Experience**:

Please see each item below. Applicants must:

* 1. Summarize education, knowledge, and experience of key personnel related to this project.

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* 1. Describe how the documented education, knowledge, and experience will be a good fit for developing the housing readiness assessment tool.

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* 1. Describe the experience providing individualized, strength-based assessments and

 creatively offering services and resources to best meet people’s needs and choices.

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* 1. Describe the experience you have assisting individuals residing in Los Angeles County

 access affordable housing benefits such as Tenant-Based Voucher Rental Assistance

 Programs, Term-Limited Lease Assistance Programs, Streamlined Lease Assistance

 Programs, Project-Based Voucher Programs, Public Housing Programs, Pilot Homeless

 Programs, and Special Purpose Voucher Programs for Specific Housing Types

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* 1. Describe the experience you have providing culturally relevant services.

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* 1. Describe the experience you have working on housing identification and/or landlord

 engagement

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* 1. Describe any experience you have had providing training to individuals with intellectual and developmental disabilities.

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* 1. Provide a list of current references (within 1 year) and/or letters of recommendation. The proposal must include at least 2 references with addresses and telephone numbers. Applicants should be aware that the selection committee will contact references or other sources to corroborate any information provided in the proposal. References cannot include employees of San Gabriel/Pomona Regional Center or other any other Regional Centers.

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1. **Equity & Diversity Statement**:

Please see each item below. Applicants must:

* 1. Provide a statement outlining applicant’s plan to serve diverse populations, including, but not limited to, culturally and linguistically diverse populations in Los Angeles County.

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* 1. Provide examples of applicant’s commitment to addressing the needs of those diverse populations.

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* 1. Provide any additional information that the applicant deems relevant to issues of equity and diversity.

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1. **Development Experience**:
	1. Briefly summarize your current and previous development or provision of services and programs as it related to this RFP.

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* 1. Discuss your experience with similar projects that will result in the creation of the housing readiness assessment tool. Highlight similarities between current or previous program(s) developed and your proposed program for this RFP.

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* 1. Highlight similarities between current or previous program(s) developed and your proposed program for this RFP.

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1. **Timeline of Project Activities:**

Provide a timeline of project activities. The project objectives are a step-by-step action plan which includes measurable, time-limited activities toward the achievement of specific project tasks and achievement of the proposed outcome. The activities should cover each major step of the project and may include but not be limited to:

* Assignment or recruitment of project staff
* Development of housing readiness assessment too.
* Submission of housing assessment tool to SG/PRC for review and approval.
* Translation of approved housing readiness assessment tool.
* Development of instructions on how to use the readiness assessment tool and collected data.
* Usability testing of the housing readiness assessment tool including but not limited to accessibility, translation, and data collection.
* Training to regional center representatives on how to use the housing readiness assessment tool and
* Launching of tool on the seven (7) LA County Regional Center websites that may include collaboration with each regional centers Information Technology Departments.

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1. **Agency Outcomes**:

Describe anticipated outcomes of proposed housing readiness assessment tool.

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1. **Assessment and Person-Centered Planning**:

Briefly describe your agency’s approach to the person-centered thinking process. Discuss how you will incorporate these ideas and philosophies into the proposed housing readiness assessment tool.

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1. **Administrative/Consultant Roles**:

Describe roles of any consultants who will assist in developing the housing readiness assessment tool for the project, if any. Provide qualifications for the consultants. Attach resumes, if available.

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1. **Methods and Procedures:**

Please see list below. Applicants must respond to each section.

* 1. Provide a statement regarding the special considerations for housing assessment readiness tool. Include proposed efforts for outreach and soliciting participation with experts in the housing community.

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* 1. Include a description of housing readiness assessment tool to be developed and used by individuals with intellectual developmental disabilities and their families. The description of the tool should include but is not limited to the following areas: Essential information about the individual, summary of housing barriers, housing and or rental history, current housing situation, household composition, income, assets available for upfront housing costs employment history, preferred cities within LA County, and housing feature needs that are important to each person such as accessibility to public transportation, employment, shopping, recreation, parking, single story. ***Attach a proposed sample.***

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1. **Staff Recruitment and Retention**:

Describe your plan to recruit and retain quality staff for the duration of the project. Include the following:

* 1. Desired characteristics for all staff positions.

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* 1. Health and criminal background screening procedures, if needed.

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* 1. Attach an organization chart that includes this project and maps the supervisory hierarchy. The chart must include the names of any governing board members and advisory boards, as well as other programs/facilities operated by the applicant.

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* 1. Provide job descriptions and qualifications for the primary staff and consultant positions necessary for this project. It is your responsibility to ensure that the qualifications for each staff person or consultant meet the criteria set forth in both the California Code of Regulations and the corresponding project description.

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1. **Home and Community-Based Setting (HCBS) Requirements**:

Acknowledge awareness and commitment to developing the service to meet the new HCBS requirements. The HCBS information can be found at <https://www.dds.ca.gov/initiatives/cms-hcbs-regulations/>

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1. **Budget and Finance**:

Discuss what financial resources you bring to the project (e.g. line of credit, cash or fluid capital reserves, etc.). Provide the most recent fiscal year independent audit or review for your organization.

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Provide a proposed budget, which details on-going operational costs of the service being proposed by applicant. The budget should be concise with all expenses sufficiently defined. The budget should be realistic in terms of the type of services to be offered in relation to income. The budget must demonstrate the financial viability of the proposal.

**Start-up Funds**: Start-up costs are costs which are necessary for the implementation of the service but not its on-going operation.

Using the attached Budget Form for Start-up Costs (Attachment E), and the Guidelines for the Use of CPP Funds (Attachment G), as a reference, display all costs associated with the start-up project. A proposed budget should be developed which details start-up costs. The budget should be concise with all expenses sufficiently defined. Start-up costs

APPLICANT/AGENCY INFORMATION - PROPOSAL COVER SHEET

COMMUNITY PLACEMENT PLAN 2023-2024

ATTACHMENT A

**PLEASE ATTACHMENT DCOUMENT WITH YOUR ELECTRONIC SUBMISSION OF THE ORIGINAL PROPSOAL**

❑ Housing Readiness Assessment Tool; ($150,000)

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NAME OF INDIVIDUAL OR ORGANIZATION SUBMITTING PROPOSAL (Please print)

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CONTACT PERSON FOR PROJECT / JOB TITLE (Please print)

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TELEPHONE NUMBER / Mobile Number / E-mail address

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NAME OF PARENT CORPORATION (IF APPLICABLE) (Please print)

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ADDRESS (Please print)

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AUTHOR OF PROPOSAL, IF DIFFERENT FROM INDIVIDUAL SUBMITTING PROPOSAL

Knowingly and willfully failing to fully and accurately disclose the information requested may result in rejection of proposal.

1. List up to four current or previous services implemented by the applicant/agency that provide evidence of experience related to your proposal. Include the service name, the dates that services started (and ended if not currently being provided) and a short description of the type/purpose of the indicated service:

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| 4. |  |
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**ATTACHMENT A (Continued)**

1. List two references that can be contacted in regards to applicant’s experience, qualifications and ability to implement this proposal *Please note reference cannot be staff from any California Regional Center*:

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| --- | --- | --- |
| 1. |  |  |
| Name & Title | Agency Affiliation |
|  | Address | Phone |
| 2. | Name & Title | Agency Affiliation |
| Address | Phone |

By signing, you hereby certify and swear under penalty of perjury that (a) you have knowledge concerning the information above, and (b) the information above is true and accurate. You agree to inform the Regional Center, in writing, within 30 days of any changes or if additional information becomes available.

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SIGNATURE OF PERSON AUTHORIZED TO BIND DATE

ORGANIZATION

**ATTACHMENT B**

**STATEMENT OF OBLIGATION**

*(please attach additional pages if needed)*

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| --- | --- | --- |
|  | Yes | No |
| 1. The applicant is presently providing services to individuals with Intellectual and developmental disabilities:
 |  |  |
| 1. The applicant is presently providing services to individuals other than those with intellectual and developmental disabilities.

If **Yes,** indicate vendoring Regional center, Angcny name, Program name, location, type & service(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
| 1. Is the applicant currently receiving grant/funds from any source to develop services for individuals with intellectual aand developmental disabilities?

If **Yes**, indicate funding source and scope of grant project.\_\_\_\_\_\_ |  |  |
| 1. Is the applicant currently applying for grant/funds from any source to develop services for Fiscal Year 2023/2024?

If **Yes,** indicate funding source & scope of grant project.\_\_\_\_\_\_\_\_ |  |  |
| 1. The applicant is planning to expand existing services (through a Letter of Intent and with or without grant funds) from a source other than San Gabriel/Pomona Regional Center during Fiscal Year 2023/2024:

If **Yes**, please provide details \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
| 1. Describe other professional/business obligations. Include name, location, type and capacity of service/obligation. Do not include services you expect to provide through this grant.(PLEASE USE SEPARATE DOCUMENT)
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| 1. Has the applicant or member of the applicant’s organization or staff ever BEEN CONVICTED for abuse OF ANY elder and/or DEPENDENT ADULT?

If **Yes**, explain in detail. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
| 1. The applicant understands that HOUSING READINESS ASSESSMENT TOOL DEVELOPED for this project will beCOME THE PROPERTY OF THE stATE OF cALIFORNIA TO BE USED FOR INDIVIDUALS WITH INTELELCTUAL AND DEVELOPMENTAL DISABILITIES AND SERVED BY THE sEVEN (7) la cOUNTY REGIONAL CENTERS.
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**ATTACHMENT C**

**COMPARABLE PROJECTS LISTING**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project Name | Current Status | Type of Project | Time to develop | Barriers (if any) |
| *EX. ABC Home* | *Licensed/Rehab/In escrow/Site search* | *Behavioral; males* | *18 mo* | *City permits* |
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**ATTACHMENT D**

**SAMPLE FINANCIAL STATEMENT**

*(for reference purposes only – verified financial statement required)*

**1. CURRENT ASSETS:**

Cash in Banks \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Accounts Receivable \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes Receivable \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Equipment/Vehicles \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Inventories \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deposits/Prepaid Expenses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Life Insurance (Cash Value) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Investment Securities (Stocks and Bonds) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. FIXED ASSETS:**

Buildings and/or Structures \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Real Estate Holdings \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Long Term Investments \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Potential Judgments and Liens \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **CURRENT LIABILITIES:**

Accounts Payable \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes Payable (Current Portion) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Taxes Payable \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. LONG-TERM LIABILITIES:**

Notes/Contracts \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Real Estate Mortgages \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5. Other income, wages, or revenues from other sources**

(Specify)

**6. Line of credit amount available**

**ATTACHMENT E**

**BUDGET FORM FOR START-UP COSTS**

**PERSONNEL SERVICES** (Staff and Consultants)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Job Title | Number (or%) FTE | FTE Monthly Salary w/Fringe Benefit | Number of Months | TOTAL |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4 |  |  |  |  |
| 5. |  |  |  |  |

Employee Fringe Benefits (\_\_\_\_\_ % of Salaries)

**START-UP PERSONNEL SERVICES SUBTOTAL \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**OPERATING EXPENSES**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Monthly Expenses | Number of Months | TOTAL |
| Office and/or Lease |  |  |  |
| Insurance |  |  |  |
| Utilities |  |  |  |
| Travel |  |  |  |
| Purchased Equipment & Supplies (list) |  |  |  |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |
| Other: |  |  |  |
| Administrative Overhead |  |  |  |

**START-UP OPERATING EXPENSES SUBTOTAL \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**TOTAL START-UP BUDGET \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| Submitted by: |  |
|  | Name | Date |

**ATTACHMENT F**

**DS1891 – APPLICANT DISCLOSURE STATEMENT**

<https://www.dds.ca.gov/wp-content/uploads/2019/05/DS1891.pdf>

**Attachment G**

**GUIDELINE FOR REGIONAL CENTER CPP AND CRDP – Fiscal Year 2023/24**

**For provider reference**

[**https://www.dds.ca.gov/services/cpp/**](https://www.dds.ca.gov/services/cpp/)