# CONTRA COSTA COUNTY EHSD

<b>Contracts</b>	Unit's	Complian	<u>ce Checklist</u>
Bid	der: M	onument I	mpact

Bid # 05 Reviewed by: Vickie Kaplan

# Submissions:

Submissions must follow the Letter of Interest Guide included in this RFI. Submissions must include the bidder's e-mail address. Emailed submissions must show RFI 722 in the Subject line. Email attachments \_\_\_\_\_\_ must be in MS Word, MS Excel, and/or PDF file formats.

Letters of Interest (LOI) will be due by 5:00 p.m. on Friday, January 2215, 2021. Please submit a cover letter detailing your agency's background, experience and references. Also attach your agency's proposed action plan to complete the services described herein.

# Components of Letter of Interest (LOI):

Applicants must submit Letter of Interest that includes the following and follows the Letter of Interest Guide.

# <u>**Rec'd?**</u> Item see Page 2 of this Compliance Checklist for compliance.

- Project Overview
- Program Budget Information (see Attachment C)
- Project Description
- Outcome Goals and Objectives of the Project (see Attachment B)
- Statement of agency qualifications regarding track record of providing the proposed services
- Proof of required insurance
- Current list of Board of Directors and Staff
- Statement of <u>NO Potential Conflict Of Interest</u> between the Contra Costa County Economic Opportunity Council members and the applicant (see Attachment D)

# If you are a current subcontractor, your previous performance will be considered in the scoring application.

## Contract Requirements

Applicants must provide proof of:

Rec'd? Item

- Worker's Compensation (for organizations with 50 employees or more)
- Professional liability
- Commercial Comprehensive Liability Insurance and Automobile Insurance
- Current list of Board of Directors and Staff
- Statement of <u>NO Potential Conflict Of Interest</u> between the Contra Costa County Economic Opportunity Council members and the applicant

Additionally, successful applicants must certify to the following prior to a resulting contract execution:

- Smoke-free work environment
- Discrimination policy
- Affirmative Action compliance
- Cultural Diversity policy

Drug-free workplace

Community Services Bureau Request for Interest #722

Pass:	$\checkmark$	Fail:
Date R	lec'd:	1/22/2021
Date Revi	ewed	: 2/3/2021

nats. January 2215, 2021. Please su

# CONTRA COSTA COUNTY EHSD

Contracts Unit's Compliance Checklist

Bidder: Monument Impact

# Bid # 05 Reviewed by: Vickie Kaplan

# Letter of Interest Guide

# Section I. Project Overview

- A. </ Applicant/Organization information
- B. ✓ Project Name
- C.  $\checkmark$  Areas of county where services are provided

# Section II. Program Budget Information

- A. ✓ Amount of CSBG funds requested (not to exceed \$99,999)
- **B.** ✓ Total CSBG project cost (should match budget)
- C. ✓ Itemized CSBG project budget using Attachment C Separate Excel file
- **D.** ✓ Leveraging-describe how you leverage other funds to provide the services you are proposing to fund.
- E. ✓ Provide budget contingency plan for reduced funding (See Section III. D)

# Section III. Project Description

- A. ✓ Priority Area to be addressed [Housing/Shelter or Employment/Jobs or Food/Nutrition or Comprehensive Health Services]
- **B.** ✓ Goal Statement (use Attachment B)
- C. ✓ Project objective(s). Description of what will be achieved, including specific measurable action-oriented, realistic and time-bound steps that demonstrate how goals will be obtained. Include National Performance Indicators (NPIs) found in Attachment A relative to the priority area(s) you wish to address along with other performance indicators or metrics related to your program proposal. In your submission, please use the template found in Attachment B.
- D. ✓ Sustainability Plan-what steps will you take if funding is reduced/eliminated?
- E. ✓ How will your program partner with existing agencies to avoid duplication and maximize efficiency?

## Section IV. Contract Requirements

- A. Vorker's Compensation
- B. ✓ Professional liability
- C. ✓ Comprehensive general liability, including automobile
- D. ✓ Current list of Board of Directors and Staff
- Statement of <u>NO potential conflict of interest</u> between the Contra Costa County Economic Opportunity Council members and the applicant

Community Services Bureau Request for Interest #722

Pass:	$\checkmark$	Fail:
Date R	ec'd	1/22/2021
Date Revi	ewec	1: 2/3/2021



Together, building a stronger community

January 22, 2021

Contra Costa County Employment and Human Services Department Contract Unit, Attention RFI #722 40 Douglas Drive Martinez, CA 94553

Dear Contra Costa County Economic Opportunity Councilmembers:

Thank you for your past support of Monument Impact (MI). For 2021-2022, MI is applying for \$66,000 from Contra Costa County's Employment and Human Services Department, RFI #722, under the Employment-Jobs priority area to support our job training program, Technology for Success. This project will support community members hardest hit by the impacts of COVID-19 by providing critical skills to secure meaningful employment, expand opportunities for advancement, and allow small businesses to thrive.

### **Background**

Founded in 2001, MI is a trusted partner in the community and serves nearly 5,000 predominantly immigrants and refugees each year. Our mission is to ensure that immigrants, refugees and low-income residents in Concord and surrounding communities have the voice, tools and relationships necessary to have an equitable share of the social and economic wealth in our region. MI works in partnership with a number of government agencies and community organizations in building the capacity of individuals to be confident and self-sufficient citizens, workers, small business owners, role models and leaders.

Monument Impact (MI) is a 501(c)(3) community-based organization that has been working to integrate Latinx immigrants into the local workforce since 2001. For the past nine years, Monument Impact has been a contractor for Employment and Human Services to provide CalWORKS services to Limited English Speakers. During this time we have consistently met our contract deliverables in assisting immigrants with significant language and cultural barriers to find employment. Spcifically, this proposal will support our Technology for Success program, *Caminos*, a 220-hour training program that includes advanced Microsoft Office, Vocational ESL and Professional Development as a launching pad for Spanish-speaking immigrants into improved career pathways and stronger small business management. A portion of the grant will also support the program's Business Services Specialist.

Over the last six years, more than 145 participants have graduated from Caminos. Prior to the Pandemic, over 75% of Caminos graduates found a new job, had a promotion or improved their business leading to improved earnings. In 2019, Caminos graduates earned an average of \$17/hour.

### MI's programs include:

**Workforce Development**: MI serves as a community hub, allowing us to develop a multi-pronged workforce development program that directly responds to the needs of the individuals we serve, particularly English Language Learners and new immigrants. **CalWORKS** provides job readiness and ESL for the workplace for limited

English proficient welfare-to-work clients and serves a diverse group of refugees. Our long-standing **Day Labor Center** is the only service provider for the area's large day laborer population. Our **Technology for Success Program** is described in more detail in the attached Project Description.

Healthy Community: Our research-based Mentes Positivas en Acción (Positive Minds in Action) serves community members who self-identify as living with stress and/or depression. The program is led by highly trained promotores and participants are followed up at 6 and 12-month intervals. We also offer physical activity and nutrition classes.

**Community Engagement**: All of MI's programs are developed with the community we serve and therefore community engagement is a key program area. We provide leadership development workshops to build the capacity of community members to advocate on key issues like immigrant rights and DACA, housing affordability, safe parks and transit, and financial literacy. Through our partnership with Jewish Family and Community Services, we offer on-site legal services and referrals for citizenship, DACA renewals and other immigration remedies. We also provide referrals for wage theft claims.

#### **References**

John Rees CalWORKs, Refugee Cash Assistance Analyst Contra Costa County – EHSD Phone: 925-608-4934

David Pontecorvo Director, Grantmaking Systems, Evaluation and Learning East Bay Community Foundation Phone: 510-208-0828

Luis Arteaga Executive Director Y & H Soda Foundation Phone: 925-631-1133

Sincerely,

a Ballinger **Debra Ballinger** 

Executive Director

# Monument Impact Request for Interest #722, Community Action Projects

### **Section I. Project Overview**

# A. Applicant/Organization information

Debra Ballinger Executive Director Monument Impact 1760 Clayton Road Concord, CA 94520 925-682-8248 debra@monumentimpact.org

Monument Impact (MI) was founded 20 years ago to address the needs of low-income immigrants and to support them in rising out of poverty. Our mission is to ensure that immigrants, refugees and low-income residents in Concord and surrounding communities have the voice, tools and relationships necessary to have an equitable share of the social and economic wealth in our region. MI is a trusted partner in the community and serves nearly 5,000 predominantly immigrants and refugees each year (even more in 2020). Our three main program areas, workforce development, healthy community, and community engagement, are integrated, allowing members to move between programs to build their skills and resilience, as well as to access opportunities for better paying work and deeper engagement in their community.

## **B. Project Name**

**Technology for Success Program** 

## C. Areas of County where Services are Provided

Services will be provided from Monument Impact's location in the Monument Corridor of Concord, but will also include Latinx immigrants from surrounding cities including Antioch, Bay Point, Pittsburg, Pacheco and Pleasant Hill.

# Section II. Program Budget Information

# A. Amount of CSBG funds requested (not to exceed \$99,999)

Monument Impact is requesting \$66,000 from CSBG.

# B. Total CSBG project cost (should match budget)

The cost of the total program including CSBG and other funding totals \$158,429.

# C. Itemized CSBG project budget (use Attachment C)

Please see attached budget.

D. Leveraging – describe how you leverage other funds to provide the services you are proposing to fund.

Monument Impact has committed funding from Y&H Soda Foundation, Dean & Margaret Lesher Foundation, City of Concord, California Public Utilities Commission, Strive for Change, and Wells Fargo to support its Technology for Success Program.

### E. Provide budget contingency plan for reducing funding (See Section III. D.)

Monument Impact has consistently funded programs through foundation, corporate and government grants, fees for service and a small number of individual donors. If funding is discontinued, we will continue to identify new foundations and potential local business sponsors and/or dedicate individual donations for Technology for Success.

### Section III. Project Description

### A. Priority Area to be Addressed

Monument Impact (MI) is requesting funding from CSBG's Employment-Jobs priority area to support our Technology for Success program. This program is unique in Contra Costa County, offering one of the only workforce development programs in the Bay Area provided in Spanish to create avenues for economic prosperity for Latinx immigrants. Utilizing English language software, Technology for Success works with primarily Limited English Proficient Spanish speakers, many with less than a high school degree. The program addresses specific barriers faced by this population and offers a viable pathway to economic stability and advancement. Technology for Success supports job seekers and small business owners alike by offering multiple avenues to achieve economic success. A portion of this funding will allow Monument Impact (MI) to fund the program's Business Services Specialist to improve career placement and advancement opportunities for graduates of our program.

For 20 years, Monument Impact has served the predominantly Latinx immigrant community living in Concord and surrounding communities. This community has historically lacked access to resources from workforce training to healthcare, education and transportation, all significant barriers to securing meaningful work that sustains community members and their families. For immigrants with limited English proficiency, limited skills and/or education and lack of a social network, these obstacles often impede career retention and advancement. Many of our graduates have the grit and determination to start their own small businesses but must acquire needed technology skills and form the social networks that help small businesses thrive.

In response to Shelter in Place Orders in March, Monument Impact staff quickly pivoted to promote social distancing and the Technology for Success Program has been offering classes to participants online. Classes were also adapted to provide a positive online learning experience. For example, classes were shortened, topics were separated to create more flexibility, the

length of the class series was decreased, and Quickbooks and basic bookkeeping were added to the curriculum. Prior to the beginning of class, staff works with all participants one-on-one to ensure they have adequate technology to participate, including a computer and internet access. Because most participants have very little or no experience with technology, staff also walks them through the process of signing up for and using software to participate, often beginning with how to turn on the computer. MI has been overwhelmed by interest during the pandemic for on-line, at-home workforce development services. In addition, responding to a request from the Pittsburg Unified School District, MI initiated classes for parents in need of increasing computer skills to support their children learning from home. Overall, MI provided 186 community members with computer training between January 1, 2020 and December 31, 2020.

MI is scheduled to launch our next Beginning Technology for Success class in February 2021. Initially, classes will be offered online, dependent on County restrictions. However, we anticipate that Technology for Success classes will resume in person in the summer of 2021.

The Technology for Success Program includes the following components:

### **Technology for Success**

The majority of our participants enter our Technology for Success Program with extremely limited knowledge of, and experience with, computers. For many, the challenge of adopting technology is compounded by limited formal education and/or limited English skills. Over 75% of our participants have less than a high school diploma and many have not completed sixth grade. Due to a lack of educational resources and poverty in their countries of origin, often the key driver of their migration, most come to the United States without the skills needed to compete in our high-tech economy. Often, participants enter the program unable to turn on a computer but go on to graduate our intensive *Caminos* (previously Career Track) course using complex formulas in MS Excel.

Using a step-by-step approach geared specifically to this population, Technology for Success provides the fundamental skills that graduates encounter in today's workplace. A rigorous and progressive curriculum focuses on building the skills for higher paying jobs and promotions throughout graduates' careers. Participants that complete our year-long program are equipped to enter the workplace, or to integrate computer programs into their own small businesses.

The confidence gained by participants as they complete our technology programs is palpable. For our *Caminos* students, completing this rigorous course not only gives them the technology tools they can leverage for better wages, it opens up a whole new world of opportunities as graduates realize they are proficient learners and can tackle new challenges. Most of the participants in Technology for Success are parents and spouses, so the impact affects not just the individual but is multiplied three or four times as it ripples through their families. Further, the networks of mutual support developed in the classroom extend into the community and strengthen the social capital so necessary for communities to thrive.

### Introduction to Computers

This 5-week introductory class is designed to support Spanish speaking parents as they assist their children with online school and provides parents the tools to use Google Chromebooks in an education setting. This class starts with a basic introductory to the Chromebook operating system and then explores Google Classroom and applications in G-Suite.

### **Beginner Class**

Monument Impact's Beginner Class targets those who have limited or no experience using a computer. Starting with the "on/off" button, this 10-week course, offered four times per year, allows participants to gain familiarity with the Windows operating system and basic computer functions. At the end of the course, graduates are able to use the keyboard and mouse, distinguish software and hardware, navigate the internet, open an e-mail account and send e-mail, use copy and paste functions, and create simple documents using WordPad and Microsoft Word. Through their practice of these skills, students also learn to type accurately and manage files.

### Intermediate Classes

MI's three distinct intermediate classes are 5-week sessions of each of the most common Microsoft applications used in the workplace: Word, Excel and PowerPoint. These classes are designed as a steppingstone leading to our Caminos Program.

### Caminos

Our *Caminos* Course (formerly called Career Track) is a 17-week, 220-hour course of study including office computing, vocational English and workplace readiness/professional development with the intention of propelling participants to higher paying jobs or small business owners to utilize technology to help their businesses grow. Students become proficient with the most utilized Microsoft Office programs including Word, Excel, Publisher, and PowerPoint, along with Intuit QuickBooks. Through a partnership with Wardrobe for Opportunity, our professional development component includes resume writing, interviewing and job search skills along with soft skills for navigating the world of an office environment. At the end of the course, Wardrobe for Opportunity provides clothing appropriate for interviewing. Most graduates of *Caminos* start in MI's Beginning and Intermediate Classes so will have spent 42 weeks taking computer classes in our program.

### **Small Business Support**

Through our *Emerging Businesses* project, MI supports *Caminos* students who are small business owners, as well as other Limited English Proficient Spanish-speakers, to formalize and license their businesses. For limited English speakers and those new to the United States, the

licensing and permitting process can be daunting. Helping small business owners navigate the landscape removes hurdles to creating viable businesses. For some, this process moves their business into a larger market and for others it is the start of their pursuit of small business ownership.

## B. Goal Statement (Use Attachment B)

As stated on Attachment B, the goal of Technology for Success is to equip Latinx immigrants in Contra Costa County with the skills necessary to secure meaningful employment, expand opportunities for advancement, and enable small businesses to thrive. Please see Attachment B for objectives.

### C. Project objectives.

Funding from CSBG will allow us to support students in their trajectory through the 220-hour *Caminos* Course. Upon successful completion of our Intermediate Course, or through examination, qualified candidates enter the program in February or July of each year. Students meet twice per week for evening sessions virtually learning advanced Microsoft Office and daytime virtual sessions of intensive Vocational ESL and Professional Development. Due to the pace of the course, students have significant homework and practice outside of class time. Throughout the course, students receive case management to support them through any academic or other issues that may arise. Over the last three years, despite the rigor of the course and the numerous obstacles participants face, over 90% of participants successfully graduate the course.

The Business Service Specialist provides continued support to *Caminos* students after graduation. Most of our participants, living and working in a new community, lack the social and professional networks through which most employment opportunities are accessed. The Business Services Specialist will use trusted relationships among local employers to create job referrals and will also use these networks to advocate for participants to secure and maintain meaningful employment with family-sufficient wages.

Alumni looking to advance in their careers may also participate in job clubs or roundtables hosted by the Business Services Specialist and focused on their needs. The Business Services Specialist will establish added opportunities for participants to support each other. When former participants support each other, they harness the social capital that can often launch them onto a new career pathway. The Bilingual Business Services Specialist is currently being hired and will ideally be hired from the community served. All our current Technology for Success staff are former graduates of our programs, and MI prioritizes hiring our own alumni whenever possible.

Many of our *Caminos* graduates use their new skills to improve the technological capabilities of their own businesses, or those of family members. These graduates receive business support assistance to navigate the complicated process of licensing and forming a new business, particularly for business owners who lack formal education and proficiency in English.

Objectives, detailed on Attachment B, include:

- 24 community members will enroll in Caminos; 90% will graduate from the program.
- 67% of graduates will improve their income after completing the Caminos Course.
- 60% of graduates will retain employment and preserve their income.

To evaluate the program, MI will use pre- and post- surveys and follow-up calls to *Caminos* graduates at 6 and 12-month intervals. Other community feedback will be continually integrated to adjust or refine program offerings as needed.

### D. Sustainability Plan - what steps will you take if funding is reduced/eliminated?

As mentioned above, Monument Impact has consistently funded programs through foundation and government grants. If funding is discontinued, we will fundraise to secure funding necessary to continue the program.

# E. How will your program partner with existing agencies to avoid duplication and maximize efficiency?

Monument Impact is the only organization in Contra Costa County offering a program like Caminos in Spanish and that focuses on both traditional employment and self-employment that many immigrants choose to pursue. As a result, we are able to reach a population that might not otherwise be served by other job training programs. MI prioritizes partnerships with government agencies and community organizations to build the capacity of individuals to be confident and self-sufficient citizens, workers, small business owners, role models and leaders. Our leadership development workshops build the capacity of community members to advocate on key issues like immigrant rights and DACA, housing affordability, safe parks, transit and financial literacy. Our partnership with Jewish Family and Community Services offers on-site legal services and referrals for citizenship, DACA renewals and support for other immigration issues. Our partnerships with Kaiser, First 5/Central County Regional Group, the City of Concord, and many others have helped improve the Monument's parks and increased safety and usage. MI's Mentes Positivas en Acción (Positive Minds in Action) Program offers free mental health classes to partner agencies like Family Justice Center, Planned Parenthood, First 5 Centers and parents in elementary schools in Concord and Pittsburg. Our community members working with other nonprofits and the Contra Costa Board of Supervisors, successfully created Stand Together Contra Costa, the county's first rapid response network and hotline, providing legal services and community education for immigrants. MI has also partnered with the City of Concord on a number of projects.

### **Statement of Agency Qualifications**

MI has extensive experience with low-income, immigrant communities. Over the last decade, we have expanded and refined our Technology for Success Program and in the last year

adapted the program to be offered online during shelter-in-place orders. MI has been a trusted partner in the Latinx immigrant community in Concord since 2001, providing a range of services that support immigrant families to reach economic stability. To date, over 3040 community members have participated in one of our computer classes and over the last 6 years, over 145 participants have graduated from the year-long program. In the last two years, over 75% of *Caminos* graduates found a new job, achieved a promotion or improved their own business, leading to improved earnings. In 2019, *Caminos* graduates earned an average of \$17/hour. Prior to the pandemic, those with microenterprises saw their incomes increase 13.25% after graduation. The impact of this program is impressive: over the last three years, over 90% of participants graduated from this program.

Many of our community members were among the first people impacted by the economic shut down and have continued to be disproportionately affected. To respond to both the medical and economic crisis, Monument Impact quickly moved to include front-line emergency response work. MI implemented its emergency Monument Relief Fund for undocumented residents to help small business owners and other working families who are not eligible to receive government assistance meet their financial needs. The fund has raised over \$1,500,000 and provided \$1,180,000 in financial assistance to over 2,200 families to date.

Staff have also advocated to prevent evictions and developed resource guides that are regularly updated to aid community members in meeting immediate needs and supporting applications for government assistance and unemployment insurance. Monument Impact, along with our partners in Raise the Roof coalition, was instrumental in Concord City Council passing an eviction moratorium and rent freeze in response to COVID-19, as well as a similar moratorium in Antioch and, most recently, a Rent Registry in the City of Concord. We created a guide for tenants called "Help! I can't pay the rent," disseminated online to over 11,000 community members.

Agencywide, at the outset of the Shelter in Place order, Monument Impact staff adapted all services to promote the practice of social distancing and support those who are home bound. All meetings, classes and workshops were conducted via telephone, Zoom or Facebook live.

**Workforce Development: CalWORKS** provides job readiness and ESL for the workplace for limited English proficient welfare-to-work clients and serves a diverse group of refugees. Our long-standing **Day Labor Center** currently is the only service provider for the area's large day laborer population.

**Healthy Community**: Monument Impact offers free physical activity classes every week in the Monument's local parks through our *Monument Moves* program. Our evidenced-based mental health program, *Mentes Positivas en Acción (Positive Minds in Action)* is led by trained community promoters. A collaboration with John Muir Health, this innovative program reaches

Spanish-speaking community members who self-identify as living with stress and depression. All of our Healthy Community Programs use Spanish-speaking promoters to disseminate tools for community members to be active, healthy, and in charge of their well-being. Participants are followed up at 3, 6 and 12-month intervals. Healthy Community Programs are currently being offered online due to the pandemic. Over the last six years, MI has positively impacted over 1,600 residents' health and effectively trained more than 35 experienced Health Promoters that disseminate tools for community members to be active, healthy, and in charge of their well-being.

**Community Engagement**: All of MI's programs are developed with input from the community we serve and therefore community engagement is a key program area. We provide leadership development workshops to build the capacity of community members to advocate on key issues like immigrant rights and DACA, housing affordability, safe parks, transit and financial literacy. Through our partnership with Jewish Family and Community Services, we offer on-site legal services and referrals for citizenship, DACA renewals and other immigration remedies. We also provide referrals for wage theft claims.

Community Services Bureau EHSD

# Request for Interest # 722 Community Action Projects Housing-Shelter / Employment-Jobs/ Food-Nutrition/Comprehensive Health Services

### ATTACHMENT B: Outcome Goals and Objectives

**GOAL**: Please state your goal in the box below. Choose one of the three priority areas and formulate a goal that describes how your program/project will impact the priority area.

Monument Impact's goal is to equip Latinx immigrants in Contra Costa County with the skills necessary to secure meaningful employment, expand opportunities for advancement, and allow small businesses to thrive.

OBJECTIVES	METRICS – Quantifiable	TIMEFRAME
objective.	Results	(When will you
	(Use NPIs in Attachment A)	complete task?)
24 community members will enroll in	21 Limited English Proficient	To be completed by
Caminos; 90% will graduate from the	speakers will obtain	end of CSBG contract,
0	skills/competencies required	February 28, 2022.
program.		1 <sup>rebruary</sup> 28, 2022.
	for employment.	
	21 training pla company	
	21 training placement	
	opportunities will be improved	
	with CSBG funding.	
67% of graduates will improve their	14 Limited English Proficient	To be completed by
income after completing the <i>Caminos</i>	Spanish speakers will increase	end of CSBG contract,
Course.		-
Course.	their income by obtain a new	February 28, 2022.
	job, gaining a promotion or	
	improving their small business.	
	12 graduates will maintain a	To be completed by
60% of graduates will retain employment	job, find a better job or	end of CSBG contract,
and preserve their income.	maintain their small business	February 28, 2022.
	for at least six months.	

Community Services Bureau EHSD

# Request for Interest # 722 Community Action Projects Housing-Shelter / Employment-Jobs/ Food-Nutrition/Comprehensive Health Services

### ATTACHMENT B: Outcome Goals and Objectives

Use this worksheet to complete Section III. B. Outcome Goal and Objective

**GOAL**: Please state your goal in the box below. Choose one of the three priority areas and formulate a goal that describes how your program/project will impact the priority area.

OBJECTIVES	METRICS – Quantifiable	TIMEFRAME
00/10111120	Results	(When will you
	(Use NPIs in Attachment	complete task?)
	Â)	

# **Budget Summary (Cost Reimbursement)**

This Worksheet is locked. Information provided in tabs A through J will be summarized below.

Legal Entity Name: Monument Impact

Doing Business As (DBA):

Contact Name: Dave Thompson

Contact Email: dave@monumentimpact.org

Contact Phone Number: 925.682.8248 ext. 2140

Contract Number:

RFI / RFP Number: RFI: 722

Budget Category	Cost Reimbursement Amount	In-Kind Amounts	Total
A. Personnel	\$43,350.00	\$60,530.68	\$103,880.68
B. Fringe Benefits	\$8,670.00	\$12,106.14	\$20,776.14
C. Travel		\$196.00	\$196.00
D. Property			
E. Supplies			
F. Facility & Infrastructure Costs	\$13,980.00	\$19,596.00	\$33,576.00
G. Consultants & Contracts			
H. Participant Costs		8	2
I. Other			
TOTAL PROJECT COSTS:	\$66,000.00	\$92,428.82	\$158,428.82

**Contract:** 

A&B. Personnel & Fringe Benefit

**A. Personnel** - List each position by title of employee. <u>Manually enter</u> the annual salary, the percentage of time to be allocated to the project, and cost. For example, an Executive Director making \$80,000 a year could allocate 60% (percentage of time) of her/his annual salary (\$80,000), and budget \$48,000. (Use decimals as the percentage of time, for example, 60.00 percent should be shown as 0.60).

If you need to add lines, please click the "+" sign located left of row 26.

Narratives are for brief mathematical explanations. Do not include service plan or payment provision descriptions in the narrative section.

Changes in personnel must immediately be communicated to EHSD in writing for approval. Submission of demands with personnel changes not approved by EHSD may result in delay in payment and or partial payment

### PERSONNEL

Position	Salary (manual	Percentage of Time (manual entry)	Cost (manual entry)
Program Manager	65,000.00	0.10	\$ 6,500.00
Business Services Specialist	45,000.00	0.50	\$ 22,500.00
Technology Coordinator	47,840.00	0.30	\$ 14,350.00
Add Personnel			1
		TOTAL:	\$ 43,350.00

**B. Fringe -** EHSD recommends using prior year's fringe costs incurred for staff who will be assigned to this contract when calculating a fringe benefit rate. Please factor in all data that may impact your fringe costs for the upcoming year, especially if the impact will increase your fringe costs.

EHSD will permit unused funds from personnel and or supplies to be transferred to fringe, **up to 10% of budgeted fringe amount per contract year**, if needed. No other cost category will be considered. Fund transfers are not automatic, and requires written request from contractor to transfer funds prior to fringe budget overrun in order to prevent partial payment and or payment delays. Request must include cost category and exact dollar amount to be transferred to fringe. Transferring of funds are not permitted if the transfer has potential to negatively impact the goals and objectives defined in the contract.

# **FRINGE BENEFITS**

**Contract:** 

A&B. Personnel & Fringe Benefit

\$ 43,350.00	0.20	\$ 8,670.00 <b>\$ 8,670.00</b>
Base (from Total Personnel)	entry)	calculates)
	Rate (manual	Total (system

# PERSONNEL & FRINGE BENEFITS NARRATIVE

.

Health insurance, Payroll taxes and Workers Comp Insurance calculated at 20% of salary.

A&B. Personnel & Fringe Benefit

# PERSONNEL (IN-KIND)

Position	Annual Salary (manual	Percentage of Time (manual entry)	Cost (manual entry)
Executive Director	110,092.00	0.03	\$ 3,302.76
Program Director	85,509.00	0.08	\$ 6,840.72
Program Manager	65,000.00	0.1	\$ 6,500.00
Administrative Coordinator	45,328.00	0.15	\$ 6,799.20
Deputy Director	90,000.00	0.04	\$ 3,600.00
Technology Coordinator	47,840.00	0.7	\$ 33,488.00
	\$ 60,530.68		

# FRINGE BENEFIT (IN-KIND)

	· · · ·	/		
		Rate		Total
		(manual		(system
Base (fron	n Total Personnel)	entry)	calculates)	
\$	60,530.68	0.20	\$	12,106.14
	IN-KI	ND TOTAL:	\$	12,106.14

# PERSONNEL & FRINGE BENEFITS NARRATIVE (IN-KIND)

Health insurance, Payroll taxes and Workers Comp Insurance calculated at 20% of salary.

# TOTAL FRINGE BENEFITS: \$ 20,776.14

A&B. Personnel & Fringe Benefit

### Contract:

**C. Travel** – Itemize travel expenses of staff personnel by purpose (e.g., staff to training, field interviews, advisory group meeting, etc.). Describe the purpose of each travel expenditure in reference to the project objectives. Include the destination and lodging in the narrative. If you need to add lines, please click on the "+" sign located left of row 20 (local travel), row 31 (non-local travel), row 53 (in-kind local travel) and row 63 (in-kind non-local travel).

### Local Travel (no lodging and no airfare)

Purpose of Travel	Number of Employees	Estimated Mileage	Cost per Mile	Tota	l Cost
				\$	-
				\$	-
				\$	-
				\$	-
				\$	-
				\$	-
			Local Travel TOTAL:	\$	-

### Non-Local Travel

Purpose of Travel	se of Travel Number of Estimated Number of Trips		Cost per Person/Trip	Total Cost	
				\$	-
				\$	-
			Lunds, († napříspa, ší (*)	\$	_
				\$	
			Non-Local Travel TOTAL:	\$	

### TRAVEL NARRATIVE

### **TRAVEL (IN-KIND)**

### IN-KIND Local Travel (no lodging and no airfare)

Purpose of Travel	Number of Employees	Estimated Mileage	Cost per Mile	То	tal Cost
Employer relations	1	350.0	\$ 0.560	\$	196.00
				\$	
				\$	
				\$	
				\$	-
			Local Travel TOTAL	: \$	196.00

### **IN-KIND** Non-Local Travel

Purpose of Travel	Number of Employees	Estimated Number of Trips	Cost per Person/Trip	Total C	Cost
see a label a fit align it any	Mara da mandar da		l i_ is _ns _des's es	\$	-
				\$	
				\$	-

TTACHMENT A: BUDGET OF ESTIMATED PROGRAM EXPENDITURE	S		Con
		\$	-
	Non-Local Travel TOTAL:	\$	-
RAVEL NARRATIVE (IN-KIND)			
ocal mileage cost reimbursement calculated at \$.56 per mile.			
san medge oost termoursement enediated at 9.50 per mile.			
	TOTAL TRAVEL COSTS:	<u> </u>	196.00

# Contract:

### F. Facility & Infrastructure

F. Facility & Infrastructure Costs - General costs to run the program, including space rental, facility maintenance, utilities, landline phones, general facility related consumable materials and supplies (toilet paper, soap, light bulbs, hand sanitizer, etc.), internet and other costs related to supporting and maintaining organizational infrastructure. Professional services purchased from vendors for facility and infrastructure costs are included in this category. Invoicing must be based on actual usage of the space.

If you need to add lines, please click on the "+" sign located left of row 19 and row 41 for in-kind facility/infrastructure costs.

Narratives are for brief mathematical explanations. Do not include service plan or payment provision descriptions in the narrative section.

### FACILITY & INFRASTRUCTURE COSTS

Description	Monthly Cost	Number of Months	Total Cost
Common Agency Shared Costs	235	12	\$ 2,820.00
Monument Shared Costs	520	12	\$ 6,240.00
Outreach and Communications Shared Costs	410	12	\$ 4,920.00
			\$ -
ille s'ene , ene , ene , pris ; en e , et e lied ;			\$ had to be a suppl
Add FACILITY & INFRASTRUCTURE COSTS			\$ disting to P and a
		TOTAL:	\$ 13,980.00

### FACILITY & INFRASTRUCTURE COSTS NARRATIVE

Agency Shared Costs: Costs related to the Headquarters' facility and other type of costs that benefit all program and supporting activities of the organization. Examples are the facility's rent and utilities, liability and property insurance, telecommunications, office supplies, depreciation, etc. These costs are pooled in a separate cost center and allocated to all supporting and program activities of the organization based on direct salaries, on a monthly basis.

**Monument Shared Costs:** Costs related to the Monument location of the organization. This location houses certain program activities. Costs include facility related expenses such as rent, utilities, equipment repair & maintenance, etc. These costs are pooled in a separate cost center and allocated to only those program activities that are housed at this location, based on direct salaries, on a monthly basis.

**Outreach and Communications Shared Costs:** Costs related to general programmatic outreach and communications. These costs include salaries, payroll taxes and benefits of certain employees that perform the programmatic outreach and communications. Such costs are pooled in a separate cost center and allocated to all program activities of the organization, based on direct

### FACILITY & INFRASTRUCTURE COSTS (IN-KIND)

Description	Monthly Cost	Number of Months	Total Cost
Common Agency Shared Costs	329	12	\$ 3,948.00
Monument Shared Costs	732	12	\$ 8,784.00
Outreach and Communications Shared Costs	572	12	\$ 6,864.00
			\$
Add FACILITY & INFRASTRUCTURE COSTS			\$
	IN-KINI	TOTAL:	\$ 19,596.00

### FACILITY & INFRASTRUCTURE COSTS NARRATIVE (IN-KIND)

FACILITY & INFRASTRUCTURE TOTAL: \$

F. Facility & Infrastructure

33,576.00

### Contract: Data Validation

### Audit Check - This Table pulls numbers from the Budget Summary and linked Tabs

	From Budget Summary	From Tabs	Difference
Personnel	103,880.68	103,880.68	0.00
Fringe Benefits	20,776.14	20,776.14	0.00
Travel	196.00	196.00	0.00
Property	0.00	0.00	0.00
Supplies	0.00	0.00	0.00
Facility & Infrastructure	33,576.00	33,576.00	0.00
<b>Consultants &amp; Contracts</b>	0.00	0.00	0.00
Participant Costs	0.00	0.00	0.00
Other	0.00	0.00	0.00
	158,428.82	158,428.82	0.00 Should be Z

A	CORD	ER	TIF	ICATE OF LIA	BILI	TY INS	URANC	:е Г		MM/DD/YYYY)
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H	MPORTANT: If the certificate holder SUBROGATION IS WAIVED, subjec	t to tl	ne te	rms and conditions of th	e poli	cy, certain p	olicies may			
t	his certificate does not confer rights	to the	cert	ificate holder in lieu of s			i).			
					CONTA NAME:	ст Linda Micl	key, Account			
	erWest Insurance Services, LLC O. Box 255188				PHONE (A/C, N	o, Ext): 530-89	7-3193	FAX (A/C, No):	530-891	-7793
	cramento CA 95865-5188				É-MAIL ADDRE	ss: Imickey@	jiwins.com			
į.						INS	SURER(S) AFFOR	RDING COVERAGE		NAIC #
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				MONUIMP-01	INSURE	RB:				
	onument Impact 60 Clayton Road				INSURE	RC:				
	ncord CA 94520				INSURE	RD:				
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LTR	I THE OF INSURANCE	INSD		POLICY NUMBER		POLICY EFF (MM/DD/YYYY)	(MM/DD/YYYY)	LIMIT	rs	
								EACH OCCURRENCE DAMAGE TO RENTED	\$	
	CLAIMS-MADE OCCUR	6						PREMISES (Ea occurrence)	\$	
								MED EXP (Any one person)	\$	
	]	1						PERSONAL & ADV INJURY	\$	
	GEN'L AGGREGATE LIMIT APPLIES PER:							GENERAL AGGREGATE	\$	
	POLICY PRO- JECT LOC							PRODUCTS - COMP/OP AGG	\$	
	OTHER:		_					COMBINED SINGLE LIMIT	\$	
	AUTOMOBILE LIABILITY							(Ea accident)	\$	
	ANY AUTO OWNED SCHEDULED							BODILY INJURY (Per person)	\$	
	AUTOS ONLY AUTOS							BODILY INJURY (Per accident)		
	AUTOS ONLY AUTOS ONLY							PROPERTY DAMAGE (Per accident)	\$	
									\$	
	UMBRELLA LIAB OCCUR							EACH OCCURRENCE	\$	
	EXCESS LIAB CLAIMS-MADE						0	AGGREGATE	\$	
	DED RETENTION \$								\$	
Α	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N			9086730-20		1/24/2020	1/24/2021	X PER OTH- STATUTE ER		
	ANYPROPRIETOR/PARTNER/EXECUTIVE	N/A						E.L. EACH ACCIDENT	\$ 1,000,0	00
	(Mandatory in NH) If yes, describe under							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,0	00
	DESCRIPTION OF OPERATIONS below							E.L. DISEASE - POLICY LIMIT	\$ 1,000,0	00
	a.									21
	CRIPTION OF OPERATIONS / LOCATIONS / VEHIC NFIRMATION OF COVERAGE.	LES (A	CORD	101, Additional Remarks Schedul	e, may be	attached if more	e space is require	d)		=
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UE				r	CANC	ELLATION				
	Contra Costa Health Servi Contracts and Grants	ce			THE	EXPIRATION ORDANCE WIT	I DATE THE	ESCRIBED POLICIES BE CA REOF, NOTICE WILL E Y PROVISIONS.		
	50 Douglas Drive 320-A Martinez CA 94553					nda W				

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ACORD'

# **CERTIFICATE OF LIABILITY INSURANCE**

MONUIMP-01

JF913276

DATE (MM/DD/YYYY) 7/29/2020

CLAIMS-MADE       X       COCUR       X       X       202048735-NPO       8/3/2020       8/3/2021       BAMAGE TO RENTED PREMISES (Ea occurrence)       \$       5000000000000000000000000000000000000	112312020	
If SUBROGATION IS WAIVED, subject to the terms and conditions of the policies, certain policies may require an endorsement. A statement this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).         PRODUCER License # 0829370       Edgewood Partners Insurance Center PLONE         P.O. Box 7072       Pasadena, CA 91109         Monument Impact 1760 Clayton Road Concord, CA 94520       INSURER s. United States Liability Insurance Company (USLI) 25895         INSURER Concord, CA 94520       INSURER C         Monument Impact 1760 Clayton Road Concord, CA 94520       INSURER C         INSURER S. CERTIFICATE NUMBER:       REVISION NUMBER:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INSURER D. INSURER R: UNITER SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. UNITS SHOWN MAY HAVE BEEN REDUCES DE SORIBED HEREIN IS SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICY ENTIFY. THAT THE POLICIES DEFINING ACCORDED BY PAD CLAMS.         INSURER TYPE OF INSURANCE       INSURER R: POLICY ENTIFY THAT THE POLICIES OF INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICY ENTIFY.         MAX       COMMERCIAL GENERAL LIABILITY       A X COMMERCIAL GENERAL LIABILITY         A       X COMMERCIAL GENERAL LIABILITY       X 202048735-NPO       8/3/2020       8/3/2020       8/3/2020       B/3/2021       EACH OCCURRENCE S       1,000         A UTOWORD 1	BY THE POLICIES	
PRODUCER License # 0829370         Concord Partners Insurance Center         P.O. Box 7072       Pasadena, CA 91109         Pasadena, CA 91109       Insurance Alliance Alliance Alliance Concord CA 94520         Insurer Impact 1760 Clayton Road Concord, CA 94520       Insurer (a) Insurer	s or be endorsed. t. A statement on	
Edgewood Partners Insurance Center P.O. Box 7072 Pasadena, CA 91109 Monument Impact 1760 Clayton Road Concord, CA 94520 Monument Impact 1760 Clayton Road Concord, CA 94520 COVERAGES CERTIFICATE NUMBER: INSURER E: INSURER E: INSURER F: COVERAGES CERTIFICATE NUMBER: COVERAGES CERTIFICATE NUMBER: COVERAGES CERTIFICATE NUMBER: THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURER D INSURER F: COVERAGES CERTIFICATE NUMBER: THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURER THE POLICY PER INSURER F: COVERAGES CERTIFICATE NUMBER: THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AND		
P.G. Box 7072 Pasadena, CA 91109 Pasadena, Pasadena, Pasadena, Pasadena, Pasadena, Pasadena, Pasadena, Pasad		
Pasadena, CA 91109       EADErss: jacqueline.flores@epicbrokers.com         INSURER A: Nonprofits' Insurance Alliance of California, Inc. (NIAC)       11845         INSURED       INSURER B: United States Liability Insurance Company (USLI)       25895         Monument Impact 1760 Clayton Road Concord, CA 94520       INSURER C:       INSURER C:       INSURER C:         INSURER B:       INSURER D:       INSURER C:       INSURER C:       INSURER C:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERE EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         INSURER VE or INSURANCE       ADDL SUBPR       POLICY NUMBER       POLICY PER POLICY PER POLICY PER POLICY PER POLICY PER POLICY NUMBER       POLICY NUMBER       POLICY PER POLICY PER POLICY PER POLICY PER POLICY PER POLICY PER POLICY PER POLICY NUMBER       POLICY NUMBER POLICY PER POLICY NUMBER       EACH OCCURRENCE       \$ 1,000 PAMAGE TO RENTED         A UTOMOBILE LIABILITY ANY AUTO       202048735-NPO       8/3/2020       8/3/2021       BOILY INNERY PER PER SINCLE LIMIT \$ 1,000         A AUTOMOBILE LIABILITY ANY AUT		
INSURER(S) AFFORDING COVERAGE         NAME           INSURED         INSURER A: Nonprofits' Insurance Alliance of California, Inc. (NIAC)         11845           INSURED         INSURER B: United States Liability Insurance Company (USLI)         25895           INSURER C:         INSURER C:         INSURER C:           INSURER D:         INSURER C:         INSURER C:           INSURER F:         INSURER C:         INSURER C:           INSURE C:         INSURER F:         INSURER C:           INSURE D:         INSURER F:         INSURER C:           INSURE D:         INSURER F:         INSURER C:           INSURE D:         INSURER F:         INSURER C:           INDICATED.         NAW PERTAIN, THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURAD BADVE FOR THE POLICY PER INDICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HERLIN IS SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.           INS         TYPE of INSURANCE         INSURER POLICY WP           INS         INSURERAL LIABILITY         Z02048735-NPO         8/3/2020         8/3/2021           A UTOMOBILE LIABILITY         Z02048735-NPO         8/3/2020         8/3/2021         PERSONAL & ADV INJURY (FER PERSON)           A AUTOMOBILE LIABILITY         Z02048735-NPO <t< td=""><td></td></t<>		
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Monument Impact 1760 Clayton Road Concord, CA 94520       INSURER C :         INSURER C       INSURER C :         INSURER D :       INSURER C :         INSURER F :       INSURER F :         COVERAGES       CERTIFICATE NUMBER:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED MAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         INSR       TYPE OF INSURANCE         MAR       X commercial General LIABILITY         A X COMMERCIAL GENERAL LIABILITY       X X         Z Liquor 1 Million Occ       X X         X Liquor 1 Million Agg       Size PER:         GEN'L AGGREGATE LIMIT APPLIES PER:       X X         X POLICY       JEET         LICC       OTHER:         A AUTONOBILE LIABILITY       202048735-NPO         A AUTONOBILE LIABILITY       202048735-NPO		
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Concord, CA 94520         INSURER E :         INSURER E :         INSURER F :         COVERAGES       CERTIFICATE NUMBER:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TER EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         NSR       TYPE OF INSURANCE       ADDI. SUBR INSD WYD       POLICY NUMBER       POLICY FF (MM/DDYYYY)       POLICY EXP (MM/DDYYYY)       EACH OCCURRENCE       \$ 1,000         A       X       COMMERCIAL GENERAL LIABILITY       X       X       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       PARD ALAGREGATE LIMIT APPLIES PER: X       202048735-NPO       8/3/2020       8/3/2021       COMBINED SINGLE LIMIT       \$ 1,000         A AUTOMOBILE LIABILITY         A       AUTOMOBILE LIABILITY       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INJURY (PER person)       \$ 1,000		
INSURER E : INSURER F :         COVERAGES       CERTIFICATE NUMBER:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERM EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         INSR LTR       TYPE OF INSURANCE       ADDL SUBR NSD       POLICY NUMBER       POLICY FF (MM/DD/YYYY)       POLICY EXP (MM/DD/YYYY)       LIMITS         A       X       COMMERCIAL GENERAL LIABILITY A       X       202048735-NPO       8/3/2020       8/3/2021       EACH OCCURRENCE       \$       1,000 GENERAL AGGREGATE LIMIT APPLIES PER: X       X       202048735-NPO       8/3/2020       8/3/2021       EACH OCCURRENCE       \$       1,000 GENERAL AGGREGATE LIMIT APPLIES PER: X       X       202048735-NPO       8/3/2020       8/3/2021       EACH OCCURRENCE       \$       3,000 GENERAL AGGREGATE       \$       3,000 GENERAL AGGREGATE       \$       3,000 GENERAL AGGREGATE       \$       3,000 FRODUCY - OMPIOP AGG       \$       3,000 FRODUCY - COMPIOP AGG       \$       3,000 FRODUCY - COMBINED SINGLE LIMIT       \$       1,000 FRODUCY - COMBINED SINGLE LIMIT       \$       1,000 FRODUCY - COMBINED SINGLE LIMIT		
COVERAGES       CERTIFICATE NUMBER:       REVISION NUMBER:         THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERI EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         INSR       TYPE OF INSURANCE       ADD SUBR INSD WVD       POLICY NUMBER       POLICY EXP POLICY EXP (MM/DD/YYYY)       LIMITS         A       X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE       X OCCUR X CLAIMS-MADE       X OCCUR X COMMERCIAL GENERAL LIABILITY       X       202048735-NPO       8/3/2020       8/3/2021       8/3/2021         A       AUTOMOBILE LIABILITY A AUTOMOBILE LIABILITY       LOC       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence)       \$ 500 PRODUCTS - COMPIOP AGG         A       AUTOMOBILE LIABILITY A AUTOMOBILE LIABILITY       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INJURY (Per person)       \$		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PER INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERM CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.         INSR       TYPE OF INSURANCE       APDL SUBR       POLICY FFF       POLICY EXP       LIMITS         A       X       COMMERCIAL GENERAL LIABILITY       ADDL SUBR       POLICY IFFF       POLICY EXP       LIMITS         X       Liquor 1 Million Occ       X       Liquor 1 Million Agg       X       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       EACH OCCURRENCE       \$       1,000         GENIL AGGREGATE LIMIT APPLIES PER:       X       POLICY       JECT       Loc       \$       3,000         A       Automobile Liability       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       EACH OCCURRENCE       \$       1,000         GENERAL AGGREGATE LIMIT APPLIES PER:       X       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INURY (PER person)       \$         A       AUTOMOBILE LIABILITY       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INURY (PER pers	n - 1	
INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH T CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERM EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. INSR LTR TYPE OF INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERM CLAIMS-MADE X OCCUR X Liquor 1 Million Occ X Liquor 1 Million Agg GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY		
A       X       COMMERCIAL GENERAL LIABILITY       X       X       CLAIMS-MADE       X       OCCUR       X       X       202048735-NPO       8/3/2020       8/3/2021       BAMAGE TO RENTED PREMISES (Ea occurrence)       \$       500         X       Liquor 1 Million Occ       X       Liquor 1 Million Agg       \$       1,000         GEN'L AGGREGATE LIMIT APPLIES PER:       X       POLICY       PECT       Loc       \$       1,000         Y       POLICY       PECT       Loc       \$       \$       3,000         OTHER:       X       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INJURY (Per person)       \$         A       AUTOMOBILE LIABILITY       202048735-NPO       8/3/2020       8/3/2021       BODILY INJURY (Per person)       \$	CT TO WHICH THIS	
CLAIMS-MADE       X       X       202048735-NPO       8/3/2020       8/3/2021       BAMAGE TO RENTED PREMISES (Ea occurrence)       \$       50         X       Liquor 1 Million Occ       X       Liquor 1 Million Agg       \$       1,000         GENTL AGGREGATE LIMIT APPLIES PER:       X       POLICY       PECT       Loc       \$       3,000         OTHER:       COMBINED SINGLE LIMIT       AUTOMOBILE LIABILITY       \$       3,000       \$       \$         A       AUTOMOBILE LIABILITY       202048735-NPO       8/3/2020       8/3/2021       8/3/2021       BODILY INJURY (Per person)       \$	3	
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X       Liquor 1 Million Occ         X       Liquor 1 Million Agg         GEN'L AGGREGATE LIMIT APPLIES PER:       PERSONAL & ADV INJURY         X       POLICY         PERSONAL & ADV INJURY       \$ 3,00         PRODUCTS - COMP/OP AGG       \$ 3,00         OTHER:       \$         AUTOMOBILE LIABILITY       202048735-NPO         8/3/2020       8/3/2021         BODILY INJURY (Per person)       \$	s 500,000	
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OTHER:     \$       A     AUTOMOBILE LIABILITY     \$     1,000       ANY AUTO     202048735-NPO     8/3/2020     8/3/2021     BODILY INJURY (Per person)     \$	3 000 000	
A AUTOMOBILE LIABILITY ANY AUTO 202048735-NPO 8/3/2020 8/3/2021 BODILY INJURY (Per person) \$	φ	
ANY AUTO 202048735-NPO 8/3/2020 8/3/2021 BODILY INJURY (Per person) \$	\$ 1,000,000	
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AUTOS ONLY AUTOS	\$	
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UMBRELLA LIAB OCCUR \$	\$	
EXCESS LIAB CLAIMS-MADE AGGREGATE \$	\$	
DED RETENTION \$ \$	\$	
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY TAKING ER		
	\$	
OFFICER/MEMBER EXCLUDED? N / A E.L. DISEASE - EA EMPLOYEE \$	\$	
If yes, describe under DESCRIPTION OF OPERATIONS below E.L. DISEASE - POLICY LIMIT	¢	
	2,000,000	
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Contra Costa County Employment and Human Services Dept. Additional Insured - Designated Person Or Organization; Form Number - CG20260413 Additional Insured - Designated Person Or Organization; Form Number - CG20260413 Additional Insured - Primary And Non-Contributory Endorsement For Public Entities; Form Number - NIAC-E61 02 17 Waiver of Transfer of Rights of Recovery: Form #NIAC-E26 1117 CERTIFICATE HOLDER Contra Costa County Employment/Human Services Dept. Attn: Contract Unit 40 Douglas Drive Martinez, CA 94553 CUTHORIZED REPRESENTATIVE Mattue A: Rettac		
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POLICY NUMBER: 2020-48735 Named Insured: Monument Impact

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

# ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – SCHEDULED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

### SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s)	Location(s) Of Covered Operations
Any person or organization that you are required to add as an additional insured on this policy, under a written contract or agreement currently in effect, or becoming effective during the term of this policy. The additional insured status will not be afforded with respect to liability arising out of or related to your activities as a real estate manager for that person or organization.	All insured premises and operations.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

- A. Section II Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by:
  - 1. Your acts or omissions; or
  - 2. The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for the additional insured(s) at the location(s) designated above.

However:

 The insurance afforded to such additional insured only applies to the extent permitted by law; and

- If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.
- B. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to "bodily injury" or "property damage" occurring after:

 All work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the additional insured(s) at the location of the covered operations has been completed; or

- 2. That portion of "your work" out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as a part of the same project.
- C. With respect to the insurance afforded to these additional insureds, the following is added to Section III Limits Of Insurance:

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or

 Available under the applicable Limits of Insurance shown in the Declarations; whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.

POLICY NUMBER: 2020-48735 Named Insured: Monument Impact

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

# ADDITIONAL INSURED – DESIGNATED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

### COMMERCIAL GENERAL LIABILITY COVERAGE PART

### SCHEDULE

### Name Of Additional Insured Person(s) Or Organization(s):

Any person or organization that you are required to add as an additional insured on this policy, under a written contract or agreement currently in effect, or becoming effective during the term of this policy. The additional insured status will not be afforded with respect to liability arising out of or related to your activities as a real estate manager for that person or organization.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

- A. Section II Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:
  - 1. In the performance of your ongoing operations; or
  - 2. In connection with your premises owned by or rented to you.

However:

- The insurance afforded to such additional insured only applies to the extent permitted by law; and
- 2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

B. With respect to the insurance afforded to these additional insureds, the following is added to Section III – Limits Of Insurance:

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

- 1. Required by the contract or agreement; or
- Available under the applicable Limits of Insurance shown in the Declarations; whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.



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### THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

# ADDITIONAL INSURED PRIMARY AND NON-CONTRIBUTORY ENDORSEMENT FOR PUBLIC ENTITIES

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

### SCHEDULE

Name of Person or Organization:

### A. Section II – WHO IS AN INSURED is amended to include:

**4.** Any public entity as an additional insured, and the officers, officials, employees, agents and/or volunteers of that public entity, as applicable, who may be named in the Schedule above, when you have agreed in a written contract or written agreement presently in effect or becoming effective during the term of this policy, that such public entity and/or its officers, officials, employees, agents and/or volunteers be added as an additional insured(s) on your policy, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by:

- a. Your negligent acts or omissions; or
- b. The negligent acts or omissions of those acting on your behalf;

in the performance of your ongoing operations.

No such public entity or individual is an additional insured for liability arising out of the sole negligence by that public entity or its designated individuals. The additional insured status will not be afforded with respect to liability arising out of or related to your activities as a real estate manager for that person or organization.

### B. Section III - LIMITS OF INSURANCE is amended to include:

**8.** The limits of insurance applicable to the public entity and applicable individuals identified as an additional insured(s) pursuant to Provision A.4. above, are those specified in the written contract between you and that public entity, or the limits available under this policy, whichever are less. These limits are part of and not in addition to the limits of insurance under this policy.

# C. With respect to the insurance provided to the additional insured(s), Condition 4. Other Insurance of SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS is replaced by the following:

### 4. Other Insurance

### a. Primary Insurance

This insurance is primary if you have agreed in a written contract or written agreement:

(1) That this insurance be primary. If other insurance is also primary, we will share with all that other insurance as described in **c**. below; or



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### POLICY NUMBER: 2020-48735

(2) The coverage afforded by this insurance is primary and non-contributory with the additional insured(s)' own insurance.

Paragraphs (1) and (2) do not apply to other insurance to which the additional insured(s) has been added as an additional insured or to other insurance described in paragraph **b**. below.

#### b. Excess Insurance

This insurance is excess over:

- 1. Any of the other insurance, whether primary, excess, contingent or on any other basis:
  - (a) That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";
  - (b) That is fire, lightning, or explosion insurance for premises rented to you or temporarily occupied by you with permission of the owner;
  - (c) That is insurance purchased by you to cover your liability as a tenant for "property damage" to premises temporarily occupied by you with permission of the owner; or
  - (d) If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion g. of SECTION I – COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE.
  - (e) Any other insurance available to an additional insured(s) under this Endorsement covering liability for damages which are subject to this endorsement and for which the additional insured(s) has been added as an additional insured by that other insurance.
- (1) When this insurance is excess, we will have no duty under Coverages A or B to defend the additional insured(s) against any "suit" if any other insurer has a duty to defend the additional insured(s) against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the additional insured(s)' rights against all those other insurers.
- (2) When this insurance is excess over other insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:
  - (a) The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
  - (b) The total of all deductible and self-insured amounts under all that other insurance.
- (3) We will share the remaining loss, if any, with any other insurance that is not described in this Excess Insurance provision and was not bought specifically to apply in excess of the Limits of Insurance shown in the Declarations of this Coverage Part.

### c. Methods of Sharing

If all of the other insurance available to the additional insured(s) permits contribution by equal shares, we will follow this method also. Under this approach each insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first.

If any other the other insurance available to the additional insured(s) does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers.



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**POLICY NUMBER: 2020-48735** NAMED INSURED: Monument Impact

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

# WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS (WAIVER OF SUBROGATION)

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART SOCIAL SERVICE PROFESSIONAL LIABILITY COVERAGE FORM

### SCHEDULE

Name of Person or Organization:

Where you are so required in a written contract or agreement currently in effect or becoming effective during the term of this policy, we waive any right of recovery we may have against that person or organization, who may be named in the schedule above, because of payments we make for injury or damage.



Together, building a stronger community

### **2021 BOARD OF DIRECTORS**

Pablo Benavente, Co-Chair Government Relations Manager, Turo

Joe Markunas, CPA, Co-Chair Partner, Health Services and Life Sciences Practice Group, CFOs 2GO

Armando Rodriguez, Treasurer Supervisory Examiner, Office of SBIC Examinations, Office of Investment and Innovation, Small Business Administration

Leta Seletzky, Secretary Writer

James Bouquin Executive Director, Cancer Support Community

Kevin Pereau Founder and Principal of TranscendIT Health and author of The Digital Health Revolution

**Debra Ballinger (ex officio)** Executive Director, Monument Impact

Updated August 2020



Together, building a stronger community

## Monument Impact 2021 Staff List

Cindy Campos Communications and Development

Cristina Guerrero Community Engagement Coordinator

Dave Thompson Program Directo

Debra Ballinger Executive Director

Elba Velasquez Workforce Development Manager

Eva Chena Technology Program Coordinator

Jennifer Morales Community Organizer

Jessica Gonzalez Community Organizer Jose Cordon Special Project Organizer

Karen Hernandez Community Organizer

Katie Selcraig Community Organizing Manager

Lorena Cruz Healthy Community Managing Consultant

Lupita Hernandez Healthy Community Coordinator

Marcelia Lewis Bookeeper/Operations Support

Maria Miranda Relief Fund Project Manager

Samira Saboor Employment Readiness Case Manager CONTRA COSTA COUNTY EHSD

TA COUNTY Community Services Bureau Request for Interest #722 Community Action Projects Housing-Shelter / Employment-Jobs/ Food-Nutrition/Comprehensive Health Services

ATTACHMENT D

#### CONFLICT OF INTEREST FORM

The below noted member of the board of directors and executive director of the noted agency hereby certifies that there is not a conflict of interest with the Contra Costa County Economic Opportunity Council. We attest that, to the best of our knowledge, no board member or staff have any direct or indirect interest with any member of the Contra Costa County Economic Opportunity Council that would prevent the exercise of fair and impartial judgment in our proposal evaluation. A conflict of interest is a transaction or arrangement that might benefit the private interest of an officer, board member, or employee.

We also understand that all proposals and their contents are considered confidential information and may not be distributed. This form shall be returned to the Employment and Human Services Department, Contracts and Grants Unit, 40 Douglas Drive, Martinez, CA 94553. Upon awarding of any contract, the proposals, with some limitations, may become public information.

Signature of Board Member

loe Markunas

Print name

Alor mille

Signature of Executive Director (ordesignee)

Debra Ballinger

Print name

01-21-2021

Date

Board Co-Chair, Monument Impact

Title / Position / Agency

01-21-2021

Date

Executive Director, Monument Impact

Title / Position / Agency