



Health, Housing & Community Services
Mental Health Commission

To: Mental Health Commissioners
From: Jamie Works-Wright, Commission Secretary
Date: October 16, 2019

Documents Pertaining to 10/24/19 Agenda items:

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3.	Interview and vote on nomination of Farzaneh Izadi to the Mental Health Commission	
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Health, Housing &
Community Services Department
Mental Health Commission

Berkeley/Albany Mental Health Commission

Regular Meeting
Thursday, October 24, 2019

Time: 7:00 p.m. – 9:00 p.m.

1947 Center Street
Basement, Multi-Purpose Room

AGENDA

All Agenda Items are for Discussion and Possible Action

Public Comment Policy: *Members of the public may speak on any items on the Agenda and items not on the Agenda during the initial Public Comment period. Members of the public may also comment on any item listed on the agenda as the item is taken up. Members of the public may not speak more than once on any given item. The Chair may limit public comment to 3 minutes or less.*

7:00 pm 1. Roll Call

2. PRELIMINARY MATTERS

- A. Action Item: Agenda Approval**
- B. Public Comment**
- C. Action Item: Approval of the September 26, 2019 Minutes**

3. Interview and vote on nomination of Farzaneh Izadi to the Mental Health Commission

4. Discuss the MHC for the cities of Berkeley and Albany Work Plan 2019-2020

5. Discuss input for Crisis Response Consultant RFP

6. Discussion and Possible Action on Subcommittee Reports

- Site Visit Subcommittee
- Accountability Subcommittee
- Mobile Crisis Response
- Membership Subcommittee

7. Mental Health Manager Updates - Steve Grolnic-McClurg

8. Berkeley Mental Health Staff Announcements

9. Prioritize Agenda Items for December Meeting

10. Announcements

9:00pm 11. Adjournment

Communications to Berkeley boards, commissions or committees are public record and will become part of the City's electronic records, which are accessible through the City's website. **Please note: Email addresses, names, addresses, and other contact information are not required, but if included in any communication to a City board, commission or committee, will become part of the public record.** If you do not want your e-mail address or any other contact information to be made public, you may deliver communications via U.S. Postal Service or in person to the secretary of the relevant board, commission or committee. If you do not want your contact information included in the public record, please do not include that information in your communication. Please contact the secretary to the relevant board, commission or committee for further information. The Health, Housing and Community Services Department does not take a position as to the content.

Contact person: Jamie Works-Wright, Mental Health Commission Secretary at 510-981-7721 or Jworks-wright@cityofberkeley.info.



*Communication Access Information: This meeting is being held in a wheelchair accessible location. To request a disability-related accommodation(s) to participate in the meeting, including auxiliary aids or services, please contact the Disability Services specialist at 981-6418 (V) or 981-6347 (TDD) at least three business days before the meeting date. **Please refrain from wearing scented products to this meeting. Attendees at trainings are reminded that other attendees may be sensitive to various scents, whether natural or manufactured, in products and materials. Please help the City respect these needs.** Thank you.*

SB 343 Disclaimer

Any writings or documents provided to a majority of the Commission regarding any item on this agenda will be made available for public inspection in the SB 343 Communications Binder located at the Family,



Department of Health,
Housing & Community Services
Mental Health Commission

Berkeley/Albany Mental Health Commission Minutes

Regular Meeting
September 26, 2019

1947 Center Street
7:00pm
Basement, Multi-Purpose Room

Members of the Public Present: Ellis Butterfield, Ron Jarekhye Covarrubias, Edward, Opton, Maria Moore, Ting Zhon (?)

Staff Present: Fawn Downs, Steve Grolnic-McClurg, Karen Klatt, Jamie Works-Wright & Tenli Yavneh.

1. Call to Order at 7:00pm

Commissioners Present: Erlinda Castro, boona cheema, Paul Kealoha-Blake, Andrea Prichett, Margaret Fine (Arrived 7:02), Shelby Heda (Arrived 7:02) Cheryl Davila (Arrived 7:09)

2. Preliminary Matters

A. Approval of the September 26, 2019 Agenda

M/S/C (Castro, Prichett) Motion to approve the July 25, 2019 Mental Health Commission Meeting Agenda – PASSED

Ayes: Castro, cheema, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** Davila Fine, Heda None.

B. Public Comment – There were no Public Comments.

C. Approval of the June 27, 2019 Meeting minutes

M/S/C (Castro, Fine) Motion to approve the June 27, 2019 Meeting minutes – PASSED

Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake; **Noes:** None;
Abstentions: Prichett; **Absent:** None.

3. Covenant House Presentation – Jarekhye Covarrubias – no action taken.

❖ At this point the following motion was made:

* **M/S/C (Prichett, Kealoha-Blake) Motion to switch the order of Interviewee so Maria can go before Edward**

Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.

4. **Interview and vote on nomination of Maria Moore to the Mental Health Commission M/S/C (Castro, Davila) Motion to nominate Maria Moore by the Mental Health Commission in order to send to Berkeley City Council for appointment.**
PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.

5. **Interview and vote on nomination of Edward Opton to the Mental Health Commission M/S/C (Davila, Prichett) Motion to nominate Edward Opton by the Mental Health Commission in order to send to Berkeley City Council for appointment.**
PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.

6. **Discussion and Possible Action on Subcommittee Reports**
 - Site Visit Subcommittee
 - *Motion for Paul Kealoha- Blake to be approved to the Site Visit Sub-committee M/S/C (Fine, Prichett)**
PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.
 - Accountability Subcommittee- No motion taken
 - Mobile Crisis Response
 - *Motion for the Sub-committee on Mobile Crisis Response to create a draft RFP for a consultant on the mobile crisis system for input and submit to the mental health division and answer any questions from the Mental Health Division about the document M/S/C (Davila, Kealoha-Blake)**
PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.
 - *Motion to appoint Andrea Prichett and remove Paul Kealoha- Blake from the Mobile Crisis responses Sub-committee M/S/C (Davila, Heda)**
PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.
 - Membership Subcommittee- No motion taken

7. **Recommendation to Council that BMH develop a 5 year Strategic Plan**
***Motion recommending to council that Berkeley Mental Health develop a 5 year strategic plan M/S/C (Prichett, Davila)**
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
Abstentions: None; **Absent:** None.

8. **Discuss and Possible Action re: Demographic Data Collection of Client Population for Purposes of Evaluating Service Delivery Results Based Accountability (RBA) by the Division of Mental Health**
No action taken- discussed at 6- Accountability Sub-Committee
9. **Discuss and Possible Action re: Calculating the Overall Costs for the 50 Highest Frequency Service Users of the Division of Mental Health (see Sacramento Study)**
No action taken- discussed at 6 - Accountability Sub-Committee
10. **Discuss and Possible Action to Assess the Capability of the Division of Mental Health to Adeptly Serve Clients Who Use Substances, including Reviewing Harm Reduction Strategies to Serve Them**
No action taken- discussed at 6 - Accountability Sub-Committee
11. **Mental Health Manager Updates - Steve Grolnic-McClurg**
 - ❖ **At this point there the following motion was made:**
 - *Motion to extend the meeting to 9:15**
 - M/S/C (Davila, Prichett)**
 - Ayes:** Castro, cheema, Davila, Fine, Heda, Kealoha-Blake, Prichett; **Noes:** None;
 - Abstentions:** None; **Absent:** None.
12. **Berkeley Mental Health Staff Announcements** – One announcement- MH director made an announcement about a thanksgiving party and the details will be given at the October mtg.
13. **Prioritize Agenda Items for October Meeting** - None
14. **Announcements** – One announcement –Council woman Davila passed out a flyer for a concert. Concert for the Climate fundraiser for the Climate Emergency October 5th 6-10pm address: 411 26th St. Oakland
15. **Adjournment – 9:14pm**
M/S/C (Fine, Castro) Motion to adjourn the meeting – PASSED
Ayes: Castro, cheema, Davila, Fine, Heda, Kealoha-Blake; **Noes:** None;
Abstentions: None; **Absent:** None.

Minutes submitted by: _____
Jamie Works-Wright, Commission Secretary

Applicant's Name _____

Mental Health Commissioner Applicant Criteria	Application	Interview
Interest - Demonstrates interest in community mental health services		
Commitment - Ready to commit to Commission duties; preparation & attendance at meetings; timely paperwork		
Diversity - Reflects the diversity of the community		
Cooperation - Able to constructively handle conflict & differences of opinion		
Welcoming - Willing and able to work alongside consumers , family members & diverse members		
Effective - Able to work with City staff, management & Berkeley & Albany City Councils		

MEMORANDUM

To: Mental Health Commission
From: Steven Grolnic-McClurg, Mental Health Manager
Date: October 14, 2019
Subject: Mental Health Manager Report

Mental Health Services

Attached is the report on caseload statistics for September (the last month in which we have data). Costs per participant, per approved budget, should be available starting next month for FY20.

Contract Negotiations between City of Berkeley (COB) and Alameda County Behavioral Healthcare Services (ACBHCS)

ACBHCS and COB continue meeting to draft a new contract between the two entities. The new contract is needed due to changes that have occurred since the last contract revision in the oversight of mental health services at the State level (Department of Mental Health was disbanded, Department of Health Care Services absorbed many of the responsibilities of DMH). The new contract will also more explicitly cover the rights and responsibilities of ACBHCS, which administers the Alameda County Behavioral Health Care Plan – this health plan contains services provided by COB.

The contract will cover geographic responsibilities, fund transfer mechanisms, service responsibilities, site certification, audit procedures, and many more items. When the contract draft is approved by both sides, City Council will need to approve entering into this contract.

Berkeley/Albany Wellness Center

The Berkeley/Albany Wellness Center is now slated to open next month, in November, 2019. The Wellness Center, located on University Avenue near MLK, will feature universal peer run services for anyone needing mental health supports. The peer run services will be a mix of structured and unstructured groups and activities. The Wellness Center will also serve as an access point for mental health services, and be active in making referrals to ACBHCS and the Berkeley Mental Health Division. In

addition, the Wellness Center will provide some short term case management and medication management services.

Mental Health Division Budget

While the City of Berkeley reports on budgets by department, I am attaching a worksheet that shows the Mental Health Division budget constructed from working papers for the start of FY20. The budget is organized by projects, and this working budget will be adjusted several times throughout the year. The goal of providing this is to support the mental health commission in understanding how the division expends funding.

Crisis System Request For Proposal

Please find attached a RFP that the City recently released for services to be funded from the mental health division. City of Berkeley formal RFPs are always listed at: <https://www.cityofberkeley.info/ContentDisplay.aspx?id=7128&portalID=20> and are distributed through email to vendors. Vendors can also sign up to be notified of RFPs by subscribing at https://public.govdelivery.com/accounts/CABERKE/subscriber/new?topic_id=CABERKE_26. The Mental Health Division is interested in receiving input from the Mental Health Commission on the content of the coming RFP for evaluating the current mental health crisis system, and the attached RFPs are meant to inform the MHC on the format of RFPs released.

Berkeley Mental Health Caseload Statistics for September 2019

Adult Services	Intended Ratio of staff to clients	Clinical Staff Positions Filled	# of clients open this month	Monthly Cost Per Participant Per Budget*	Fiscal Year 2020 Demographics as of October 2019
Adult, Older Adult and TAY Full Service Partnership (FSP) (Highest level outpatient clinical case management and treatment)	1-10 for clinical staff.	6 Clinicians 1 Team Lead	72	TBD	74 Clients American Indian: 0 API: 1 African-American: 24 Hispanic: 3 Other: 30 White: 16 Male: 47 Female: 27
Adult FSP Psychiatry	1-100	.5 FTE	Unavailable	TBD	
Comprehensive Community Treatment (CCT) (High level outpatient clinical case management and treatment)	1-20	9.5 Clinicians .5 Lead Clinician 1 Non-Degreed Clinical 1 Manager	176	TBD	181 Clients API: 6 African-American: 50 Hispanic: 9 Other: 75 White: 41 Male: 97 Female: 84
CCT Psychiatry	1-200	.75	Unavailable	TBD	
Focus on Independence Team (FIT) (Lower level of care, only for individuals previously on FSP or CCT)	1-20 Team Lead, 1-50 Post Masters Clinical 1-30 Non-Degreed Clinical	1 Clinical Supervisor, 1 Licensed Clinician, 1 CHW Sp./ Non-Degreed Clinical	97	TBD	93 Clients API: 3 African American: 31 Hispanic: 2 Other: 25 White: 32 Male: 57 Female: 36
FIT Psychiatry	1-200	.25	Unavailable		

Family, Youth and Children's Services	Intended Ratio of staff to clients	Clinical Staff Positions Filled	# of clients open this month	Monthly Cost Per Participant Per Budget*	Fiscal Year 2019 Demographics as of October, 2019
Children's Full Service Partnership	1-8	2.0 Clinical	10	TBD	15 Clients API: 0 African-American: 6 Hispanic: 3 Other: 1 White: 5 Male: 11 Female: 4
Early and Periodic Screening, Diagnostic and Treatment Prevention (EPSDT) /Educationally Related Mental Health Services (ERMHS)	1-20	2.5 Clinical	63	TBD	62 Clients API: 1 African-American: 20 Hispanic: 12 Other: 14 White: 15 Male: 40 Female: 22
High School Health Center and Berkeley Technological Academy (Note: school not in session)	1-6 Clinician (majority of time spent on crisis counseling)	2.5 Clinical	Treatment: 27 Groups: 0 offered, 10 conducted Drop In (Crisis): 94	N/A	N/A

Crisis, ACCESS, and Homeless Services	Staff Ration	Clinical Staff Positions Filled	Total # of Clients/Incidents
Homeless Outreach and Treatment Team (HOTT)	1-10 Case Manager 1-3 Team Lead	1 Team Lead, 1 Licensed Clinician, 3 Case Managers	33 enrolled clients for the month. 54 non-enrolled individuals received outreach.
HOTT Psychiatry (data from Feb)	1-100	0	0
Mobile Crisis	N/A	3 Clinicians, 1 Team Lead	<ul style="list-style-type: none"> • 124 Incidents • 51 5150 Evals • 20 5150 Evals leading to involuntary transport
Transitional Outreach Team (TOT)	N/A	1 Licensed Clinician, 1 Non-Licensed Staff	90 Incidents

Not reflected in above chart is Early Childhood Consultation, ACCESS, Wellness and Recovery Programming, or Family Support.

* Monthly costs determined by dividing yearly budgeted amounts for programs by number of participants, then dividing this rate by 12.

Budget By Fund

Position	General Fund						
	FTE	Admin	FTE	PCEI	FTE	FYC	FTE
TOTAL PERSONNEL	0.56	130,320	0.85	128,083	0	0	5.95
TOTAL NON-PERSONNEL COST		195,286		0			38,365
TOTAL PERSONNEL AND NON-PERSONNEL		325,606		128,083			38,365

Budget By Project (not exact)

	Adult FSP	Children's FSP	CCT/FIT
TOTAL PERSONNEL	12.99	3.44	12.53
TOTAL NON-PERSONNEL COST	1,960,992	570,548	2,186,410
TOTAL PERSONNEL AND NON-PERSONNEL	241,252	30,650	259,702
	2,202,244	601,198	2,446,112

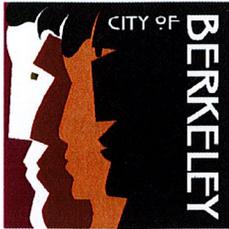
					MHSA							
	FTE	CCT/FIT	FTE	TOTAL 010	FTE	Admin PEI	FTE	CSS Admin	FTE	CSS Develop	FTE	
Crisis	0.15	63,234	7.51	1,377,425	1.07	193,497	2.73	490,616	8.93	1,152,605	12.27	
1,055,788				277,083		43,456		178,189		745,750		
27,712				1,654,508		236,953		668,805		1,898,355		
1,083,500												

	FTE	MCO	FTE	INNOVATIONS	FTE	PEI	FTE	FSP-FYC	FTE	CRISIS	FTE
Adult FSP	1	174,470	0	0	4.292	672,530	3.44	570,548	0.55	94,628	0.25
		137,050		250,000		816,104		30,650		12,500	
		311,520		250,000		1,488,634		601,198		107,128	

CCT/FIT	FTE	TOTAL 063	Medi-Cal		Admin	FTE	FSP-Medi-Cal	FTE	FYC	FTE	CRISIS	FTE
			FTE	2.64								
52,251	34.532	5,274,222	2.64	526,409	0.72	87,915	1.91	315,974	1.78	226,307	12.13	
22,000		2,476,951		530,282		0		83,129		78,522		
74,251		7,751,173		1,056,691		87,915		399,103		304,829		

			EPSDT		Donations	Combined Charities		ERMHS
CCT/FIT	FTE	TOTAL 065	FTE	EPSDT - FYC	FTE	FTE	Comb. Charities	FTE
2,070,925	19.18	3,227,530	2.39	355,475	0	0	0	1.42
221,982		913,915		6,827		7,500	20,100	
2,292,907		4,141,445		362,302		7,500	20,100	

ERMHS-SELPA	Realignment		Admin	FTE	MATCH	TOTAL 960	Crisis Grant		MHOAC/FYC	Staff Alloc in Program	Total Expense
	FTE						FTE				
189,555	4.18		736,329	11.37	1,853,925	2,590,254	2.41	339,877	82.992	13,337,280	
1,040			251,913		146,650	398,563		46,623		4,127,748	
190,595			988,242		2,000,575	2,988,817		386,500		17,465,028	



Finance Department
General Services Division

REQUEST FOR PROPOSALS (RFP)
Specification No. 20-11349-C
FOR
RESULTS BASED ACCOUNTABILITY EVALUATION
PROPOSALS WILL NOT BE OPENED AND READ PUBLICLY

Dear Proposer:

The City of Berkeley is soliciting written proposals from qualified firms or individuals to *implement the Results Based Accountability ("RBA") Framework within the Mental Health Division*. As a Request for Proposal (RFP) this is not an invitation to bid and although price is very important, other factors will be taken into consideration.

The project scope, content of proposal, and vendor selection process are summarized in the RFP (attached).

Proposals must be received no later than 2:00 pm, on Thursday, October 17, 2019. All responses must be in a sealed envelope and have "**Results Based Accountability Evaluation**" and **Specification No. 20-11349-C** clearly marked on the **outer most mailing envelope**. Please submit one (1) unbound original and three (3) unbound copies of the proposal as follows:

Mail or Hand Deliver To:

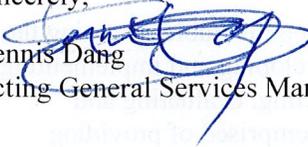
City of Berkeley
Finance Department/General Services Division
2180 Milvia Street, 3rd Floor
Berkeley, CA 94704

Proposals will not be accepted after the date and time stated above. Incomplete proposal or proposals that do not conform to the requirements specified herein will not be considered. Issuance of the RFP does not obligate the City to award a contract, nor is the City liable for any costs incurred by the proposer in the preparation and submittal of proposals for the subject work. The City retains the right to award all or parts of this contract to several bidders, to not select any bidders, and/or to re-solicit proposals. The act of submitting a proposal is a declaration that the proposer has read the RFP and understands all the requirements and conditions.

For questions concerning the anticipated work, or scope of the project, please contact **Andrea Bates, Assistant Management Analyst**, via email at abates@cityofberkeley.info no later than **2:00pm, Thursday, October 3, 2019**. Answers to questions will **not** be provided by telephone or email. Rather, answers to all questions or any addenda will be **posted** on the City of Berkeley's website at <http://www.cityofberkeley.info/ContentDisplay.aspx?id=7128>. It is the vendor's responsibility to check this site. For general questions concerning the submittal process, contact purchasing at 510-981-7320.

We look forward to receiving and reviewing your proposal.

Sincerely,


Dennis Dang
Acting General Services Manager

I. INTRODUCTION

The City of Berkeley, Health, Housing and Community Services (HHCS) Department, Mental Health Division is seeking to contract with an evaluator with expertise in implementing the Results-Based Accountability (“RBA”) Framework to evaluate programs. The evaluator will train the Division on the RBA Framework and will work with staff on establishing and collecting RBA performance measures to evaluate outcomes for all internal programs. The total amount of the contract is \$100,000 for a two (2) year, i.e., 24 month timeframe.

RBA is a data driven, decision-making process that has a proven track record of success in improving program performance and the quality of life of program participants. The RBA Framework provides a new way of understanding the quality and impact of services provided by collecting data that answer three basic questions:

1. How much did you do?
2. How well did you do it?
3. Is anyone better off?

Among other things, RBA builds collaboration and consensus; helps groups to surface and challenge assumptions that can be barriers to innovation; and uses data and transparency to ensure accountability for program performance.

In FY2018, the City of Berkeley introduced a new initiative in the HHCS Department called “Impact Berkeley.” Central to this effort is using the RBA Framework to account for the work of the Department. Through this initiative the RBA framework, was incorporated into selected programs within the HHCS Department. In the Mental Health Division, RBA was implemented with six of the Mental Health Services Act (MHSA) funded contractors. This included community agency programs funded through the Prevention & Early Intervention (PEI) Community Education & Supports program. Through “Impact Berkeley” HHCS Department staff worked with each contractor to envision, clarify, and develop measures on the outcomes and results each program sought to achieve, and used a rigorous framework to measure and enhance progress towards desired results. A report on the initial Impact Berkeley PEI program results can be accessed on the MHSA website: [MHSA Plans and Updates - City of Berkeley, CA](#)

The Mental Health Division is committed to finding new ways to strengthen and report on program performance outcomes, and to increase its impact on the community. To support this effort, the Division seeks to implement the RBA framework to evaluate the performance of all mental health programs. RBA will provide the Division with a method and common language to better understand and communicate program results.

II. SCOPE OF SERVICES

Service Description

An experienced evaluator will implement the RBA Framework to evaluate the outcomes of each program in the Mental Health Division. The chosen evaluator will train the Division on the RBA Framework including assisting staff in developing a common language that can be used to communicate program results. Additional duties will include: working with designated staff from each program to establish and embed RBA measures into each program; developing and implementing standardized data collection tools; collecting data, and reporting out on program outcomes; and assisting the Division in implementing strategies that will build and sustain the RBA evaluation efforts. In executing this work, it is possible that the Evaluator may also be expected at times, to collaborate in some way with HHCS Departmental staff who are involved with the Impact Berkeley initiative and/or City Staff from other Departments who are involved in utilizing the RBA framework in other initiatives.

It is envisioned that the first year of this contract will primarily be spent on the following deliverables: training the Division on the RBA Framework; working with staff from each internal program on developing and implementing RBA measures; creating and implementing standardized data collection tools; and collecting, evaluating and reporting out on program outcomes. Work deliverables during the second year will be comprised of providing technical assistance to program staff to develop proficiency with implementing the RBA framework; continuing to collect, evaluate and report out on program data; and establishing measures to build the Division’s capacity to sustain evaluation efforts within the system.

Contract Terms

It is anticipated that this contract will begin on February 1, 2020 and will be in effect until January 31, 2022.

III. SUBMISSION REQUIREMENTS

All proposals shall include the following information, organized as separate sections of the proposal. The proposal should be concise and to the point.

1. Contractor Identification/Expertise:

Provide the name of the firm, the firm's principal place of business, the name and telephone number of the contact person and company tax identification number.

Describe firm's expertise with designing and executing evaluations within government entities and/or community-based mental health or behavioral health agencies. Describe any direct experience providing training, technical assistance, and evaluation using the Results-Based Accountability framework.

2. Client References:

Provide a minimum of *three (3)* client references. References should be California cities or other large public sector entities. Provide the designated person's name, title, organization, address, telephone number, and the project(s) that were completed under that client's direction.

3. Service Description:

Provide a detailed description of how you will perform each of the following work areas listed below including strategies that you will use to implement each task: training the Division on the RBA Framework; assisting staff in developing a common language that can be used to communicate program results; establishing and embedding RBA measures into each program; developing and implementing standardized data collection tools; collecting data, and reporting out on program outcomes; assisting the Division in implementing strategies that will build and sustain the RBA evaluation efforts; collaborating with staff from other City Divisions or Departments as requested, on other City RBA initiatives.

4. Price Proposal:

The proposal shall include pricing for all services. Pricing shall be all inclusive unless indicated otherwise on a separate pricing sheet. The Proposal shall itemize all services, including hourly rates for all professional, technical and support personnel, and all other charges related to completion of the work shall be itemized.

5. Contract Terminations:

If your organization has had a contract terminated in the last five (5) years, describe such incident. Termination for default is defined as notice to stop performance due to the vendor's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the vendor, or (b) litigated and such litigation determined that the vendor was in default.

Submit full details of the terms for default including the other party's name, address, and phone number. Present the vendor's position on the matter. The City will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience.

If the firm has not experienced any such termination for default or early termination in the past five (5) years, so indicate.

IV. SELECTION CRITERIA

The following criteria will be considered, although not exclusively, in determining which firm is hired.

1. Contractor Identification/Expertise and References – (40%)
2. Service Description – (40%)
3. Price Proposal/Budget – (20%)

A selection panel will be convened of City Staff and Committee Stakeholders will be convened for selection purposes. The panel will evaluate each proposal against the requirements stated herein. The recommendation will be made to the respondent whose proposal represents the best, overall fit and value to the City.

V. PAYMENT

Invoices: Invoices must be fully itemized, and provide sufficient information for approving payment and audit. Invoices must be accompanied by receipt for services in order for payment to be processed. Mail invoices to the Project Manager and reference the contract number.

City of Berkeley
Accounts Payable
PO Box 700
Berkeley, CA 94701
Attn: **Andrea Bates/HHCS**

Payments: The City will make payment to the vendor within 30- days of receipt of a correct and complete invoice.

VI. CITY REQUIREMENTS

*(Do not modify any part of this section except: Living Wage would not apply if commodities are being purchased and Equal Benefits would not apply if the contract amount will be less than \$25,000. If this is the case, do not delete the section just note next to it “**Does Not Apply to this Request For Proposal**”)*

A. Non-Discrimination Requirements:

Ordinance No. 5876-N.S. codified in B.M.C. Chapter 13.26 states that, for contracts worth more than \$3,000 bids for supplies or bids or proposals for services shall include a completed Workforce Composition Form. Businesses with fewer than five employees are exempt from submitting this form. (See B.M.C. 13.26.030)

Under B.M.C. section 13.26.060, the City may require any bidder or vendor it believes may have discriminated to submit a Non-Discrimination Program. The Contract Compliance Officer will make this determination. This applies to all contracts and all consultants (contractors). Berkeley Municipal Code section 13.26.070 requires that all contracts with the City contain a non-discrimination clause, in which the contractor agrees not to discriminate and allows the City access to records necessary to monitor compliance. This section also applies to all contracts and all consultants. **Bidders must submit the attached Non-Discrimination Disclosure Form with their proposal**

B. Nuclear Free Berkeley Disclosure Form:

Berkeley Municipal Code section 12.90.070 prohibits the City from granting contracts to companies that knowingly engage in work for nuclear weapons. This contracting prohibition may be waived if the City Council determines that no reasonable alternative exists to doing business with a company that engages in nuclear weapons work. If your company engages in work for nuclear weapons, explain on the Disclosure Form the nature of such work. **Bidders must submit the attached Nuclear Free Disclosure Form with their proposal.**

C. Oppressive States:

The City of Berkeley prohibits granting of contracts to firms that knowingly provide personal services to specified Countries. This contracting prohibition may be waived if the City Council determines that no reasonable alternative exists to doing business with a company that is covered by City Council Resolution No. 59,853-N.S. If your company or any subsidiary is covered, explain on the Disclosure Form the nature of such work. **Bidders must submit the attached Oppressive States Disclosure Form with their proposal.**

D. Conflict of Interest:

In the sole judgment of the City, any and all proposals are subject to disqualification on the basis of a conflict of interest. The City may not contract with a vendor if the vendor or an employee, officer or director of the proposer's firm, or any immediate family member of the preceding, has served as an elected official, employee, board or commission member of the City who influences the making of the contract or has a direct or indirect interest in the contract.

Furthermore, the City may not contract with any vendor whose income, investment, or real property interest may be affected by the contract. The City, at its sole option, may disqualify any proposal on the basis of such a conflict of interest. **Please identify any person associated with the firm that has a potential conflict of interest.**

E. Berkeley Living Wage Ordinance:

Chapter 13.27 of the Berkeley Municipal Code requires that contractors offer all eligible employees with City mandated minimum compensation during the term of any contract that may be awarded by the City. If the Contractor is not currently subject to the Living Wage Ordinance, cumulative contracts with the City within a one-year period may subject Contractor to the requirements under B.M.C. Chapter 13.27. A certification of compliance with this ordinance will be required upon execution of a contract. The Living Wage rate is currently \$14.97 (if medical benefits are provided) or \$17.45 (if medical benefits are not provided). The Living Wage rate is adjusted automatically effective June 30th of each year commensurate with the corresponding increase in the Consumer Price Index published in April of each year. If the Living Wage rate is adjusted during the term of your agreement, you must pay the new adjusted rate to all eligible employees, regardless of what the rate was when the contract was executed.

F. Berkeley Equal Benefits Ordinance:

Chapter 13.29 of the Berkeley Municipal Code requires that contractors offer domestic partners the same access to benefits that are available to spouses. A certification of compliance with this ordinance will be required upon execution of a contract.

G. Statement of Economic Interest:

The City's Conflict of Interest Code designates "consultants" as a category of persons who must complete Form 700, Statement of Economic Interest, at the beginning of the contract period and again at the termination of the contract. The selected contractor will be required to complete the Form 700 before work may begin.

VII. OTHER REQUIREMENTS

A. Insurance

The selected contractor will be required to maintain general liability insurance in the minimum amount of \$2,000,000, automobile liability insurance in the minimum amount of \$1,000,000 and a professional liability insurance policy in the amount of \$2,000,000 to cover any claims arising out of the performance of the contract. The general liability and automobile insurance must name the City, its officers, agents, volunteers and employees as additional insureds.

Insurance not Necessary: *If the services are such that the risk of exposure to liability is very low, insurance may not be required. An example of such a service is an individual using his/her computer at home to lay out a newsletter for the City. This determination must be made by the Risk Manager in writing before the RFP is issued.*

Insurance Waiver: *A situation in which insurance is not necessary is different from a case in which insurance may be waived. An insurance waiver is appropriate where insurance would usually be necessary but when, as a policy matter, the City is willing to take the risk of allowing an uninsured or under-insured individual or business to perform the work (usually when the risk of liability is low). An insurance waiver may be granted only by the Risk Manager in writing with the approval of the City Manager. If a potential bidder expresses an inability to meet the insurance requirement, he or she should be encouraged to contact the Project Manager & Risk Manager for assistance in obtaining insurance.)*

B. Worker's Compensation Insurance:

A selected contractor who employs any person shall maintain workers' compensation insurance in accordance with state requirements. Sole proprietors with no employees are not required to carry Worker's Compensation Insurance.

C. Business License

Virtually every contractor that does business with the City must obtain a City business license as mandated by B.M.C. Ch. 9.04. The business license requirement applies whether or not the contractor has an office within the City limits. However, a "casual" or "isolated" business transaction (B.M.C. section 9.04.010) does not subject the contractor to the license tax. Warehousing businesses and charitable organizations are the only entities specifically exempted in the code from the license requirement (see B.M.C. sections, 9.04.295 and 9.04.300). Non-profit organizations are granted partial exemptions (see B.M.C. section 9.04.305). Persons who, by reason of physical infirmity, unavoidable misfortune, or unavoidable poverty, may be granted an exemption of one annual free license at the discretion of the Director of Finance. (see B.M.C. sections 9.04.290).

Vendor must apply for a City business license and show proof of application to Purchasing Manager within seven days of being selected as intended contractor.

The Customer Service Division of the Finance Department located at 1947 Center Street, Floor, Berkeley, CA 94704, issues business licenses. Contractors should contact this division for questions and/or information on obtaining a City business license, in person, or by calling 510-981-7200.

D. Recycled Paper

All reports to the City shall be on recycled paper that contains at least 50% recycled product when such paper is available at a cost of not greater than ten percent more than the cost of virgin paper, and when such paper is available at the time it is required. If recycled paper is not available the Contractor shall use white paper. Written reports or studies shall be ***printed on both sides of the page*** whenever practical.

E. State Prevailing Wage:

Certain labor categories under this project may be subject to prevailing wages as identified in the State of California Labor Code commencing in Section 1770 et. seq. These labor categories, when employed for any “work performed during the design and preconstruction phases of construction including, but not limited to, inspection and land surveying work,” constitute a “Public Work” within the definition of Section 1720(a)(1) of the California Labor Code requiring payment of prevailing wages.

Wage information is available through the California Division of Industrial Relations web site at: http://www.dir.ca.gov/OPRL/statistics_and_databases.html

VIII. SCHEDULE (dates are subject to change)

- | | |
|--|------------------------------|
| <input type="checkbox"/> Issue RFP to Potential Bidders: | Thursday, September 19, 2019 |
| <input type="checkbox"/> Questions Due | Thursday, October 3, 2019 |
| <input type="checkbox"/> Proposals Due from Potential Bidders | Thursday, October 17, 2019 |
| <input type="checkbox"/> Complete Selection Process | Thursday, October 31, 2019 |
| <input type="checkbox"/> Council Approval of Contract (over \$50k) | Tuesday, January 21, 2020 |
| <input type="checkbox"/> Award of Contract | Wednesday, January 22, 2020 |
| <input type="checkbox"/> Sign and Process Contract | Thursday, January 30, 2020 |
| <input type="checkbox"/> Notice to proceed | Friday, January 31, 2020 |

Thank you for your interest in working with the City of Berkeley for this service. We look forward to receiving your proposal.

Attachments:

- | | |
|---|--------------|
| • Check List of Required items for Submittal | Attachment A |
| • Non-Discrimination/Workforce Composition Form | Attachment B |
| • Nuclear Free Disclosure Form | Attachment C |
| • Oppressive States Form | Attachment D |
| • Living Wage Form | Attachment E |
| • Equal Benefits Certification of Compliance | Attachment F |
| • Right to Audit Form | Attachment G |
| • Insurance Endorsement | Attachment H |

ATTACHMENT A

CHECKLIST

- Proposal describing service one (1) unbound original and 3 unbound copies.
- Contractor Identification and Company Information
- Client References
- Costs proposal by task, type of service & personnel
- The following forms, completed and **signed in blue ink** (attached):
 - Non-Discrimination/Workforce Composition Form Attachment B
 - Nuclear Free Disclosure Form Attachment C
 - Oppressive States Form Attachment D
 - Living Wage Form (*may be optional*) Attachment E
 - Equal Benefits Ordinance Certification of Compliance (EBO-1) Attachment F

ADDITIONAL SUBMITTALS REQUIRED FROM SELECTED VENDOR AFTER COUNCIL APPROVAL TO AWARD CONTRACT.

- Provide **original-signed in blue ink** Evidence of Insurance
 - Auto
 - Liability
 - Worker's Compensation
- Right to Audit Form Attachment G
- Commercial General & Automobile Liability Endorsement Form Attachment H
- Berkeley Business License

For informational purposes only: Sample of Personal Services Contract can be found on the City's website on the current bid and proposal page at the top of the page.

NON-DISCRIMINATION/WORKFORCE COMPOSITION FORM FOR NON-CONSTRUCTION CONTRACTS

To assist the City of Berkeley in implementing its Non-Discrimination policy, it is requested that you furnish information regarding your personnel as requested below and return it to the City Department handling your contract:

Organization: _____

Address: _____

Business Lic. #: _____

Occupational Category: _____ (See reverse side for explanation of terms)	Total Employees		White Employees		Black Employees		Asian Employees		Hispanic Employees		Other Employees	
	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
	Official/Administrators											
Professionals												
Technicians												
Protective Service Workers												
Para-Professionals												
Office/Clerical												
Skilled Craft Workers												
Service/Maintenance												
Other (specify)												
Totals:												

Is your business MBE/WBE/DBE certified? Yes _____ No _____ If yes, by what agency? _____

If yes, please specify: Male: _____ Female: _____ Indicate ethnic identifications: _____

Do you have a Non-Discrimination policy? Yes: _____ No: _____

Signed: _____ Date: _____

Verified by: _____ Date: _____

City of Berkeley Contract Compliance Officer

Occupational Categories

Officials and Administrators - Occupations in which employees set broad policies, exercise overall responsibility for execution of these policies, or provide specialized consultation on a regional, district or area basis. Includes: department heads, bureau chiefs, division chiefs, directors, deputy superintendents, unit supervisors and kindred workers.

Professionals - Occupations that require specialized and theoretical knowledge that is usually acquired through college training or through work experience and other training that provides comparable knowledge. Includes: personnel and labor relations workers, social workers, doctors, psychologists, registered nurses, economists, dietitians, lawyers, systems analysts, accountants, engineers, employment and vocational rehabilitation counselors, teachers or instructors, and kindred workers.

Technicians - Occupations that require a combination of basic scientific or technical knowledge and manual skill that can be obtained through specialized post-secondary school education or through equivalent on-the-job training. Includes: computer programmers and operators, technical illustrators, highway technicians, technicians (medical, dental, electronic, physical sciences) and kindred workers.

Protective Service Workers - Occupations in which workers are entrusted with public safety, security and protection from destructive forces. Includes: police officers, fire fighters, guards, sheriffs, bailiffs, correctional officers, detectives, marshals, harbor patrol officers, and kindred workers.

Para-Professionals - Occupations in which workers perform some of the duties of a professional or technician in a supportive role, which usually requires less formal training and/or experience normally required for professional or technical status. Such positions may fall within an identified pattern of a staff development and promotion under a "New Transporters" concept. Includes: library assistants, research assistants, medical aides, child support workers, police auxiliary, welfare service aides, recreation assistants, homemaker aides, home health aides, and kindred workers.

Office and Clerical - Occupations in which workers are responsible for internal and external communication, recording and retrieval of data and/or information and other paperwork required in an office. Includes: bookkeepers, messengers, office machine operators, clerk-typists, stenographers, court transcribers, hearings reporters, statistical clerks, dispatchers, license distributors, payroll clerks, and kindred workers.

Skilled Craft Workers - Occupations in which workers perform jobs which require special manual skill and a thorough and comprehensive knowledge of the processes involved in the work which is acquired through on-the-job training and experience or through apprenticeship or other formal training programs. Includes: mechanics and repairpersons, electricians, heavy equipment operators, stationary engineers, skilled machining occupations, carpenters, compositors and typesetters, and kindred workers.

Service/Maintenance - Occupations in which workers perform duties which result in or contribute to the comfort, convenience, hygiene or safety of the general public or which contribute to the upkeep and care of buildings, facilities or grounds of public property. Workers in this group may operate machinery. Includes: chauffeurs, laundry and dry cleaning operatives, truck drivers, bus drivers, garage laborers, custodial personnel, gardeners and groundskeepers, refuse collectors, and construction laborers.

CITY OF BERKELEY
Nuclear Free Zone Disclosure Form

I (we) certify that:

1. I am (we are) fully cognizant of any and all contracts held, products made or otherwise handled by this business entity, and of any such that are anticipated to be entered into, produced or handled for the duration of its contract(s) with the City of Berkeley. (To this end, more than one individual may sign this disclosure form, if a description of which type of contracts each individual is cognizant is attached.)
2. I (we) understand that Section 12.90.070 of the Nuclear Free Berkeley Act (Berkeley Municipal Code Ch. 12.90; Ordinance No. 5784-N.S.) prohibits the City of Berkeley from contracting with any person or business that knowingly engages in work for nuclear weapons.
3. I (we) understand the meaning of the following terms as set forth in Berkeley Municipal Code Section 12.90.130:

"Work for nuclear weapons" is any work the purpose of which is the development, testing, production, maintenance or storage of nuclear weapons or the components of nuclear weapons; or any secret or classified research or evaluation of nuclear weapons; or any operation, management or administration of such work.

"Nuclear weapon" is any device, the intended explosion of which results from the energy released by reactions involving atomic nuclei, either fission or fusion or both. This definition of nuclear weapons includes the means of transporting, guiding, propelling or triggering the weapon if and only if such means is destroyed or rendered useless in the normal propelling, triggering, or detonation of the weapon.

"Component of a nuclear weapon" is any device, radioactive or non-radioactive, the primary intended function of which is to contribute to the operation of a nuclear weapon (or be a part of a nuclear weapon).

4. Neither this business entity nor its parent nor any of its subsidiaries engages in work for nuclear weapons or anticipates entering into such work for the duration of its contract(s) with the City of Berkeley.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Results Based Accountability Evaluation / 20-11349-C**

Attachment C

CITY OF BERKELEY
Oppressive States Compliance Statement

The undersigned, an authorized agent of _____ (hereafter "Vendor"), has had an opportunity to review the requirements of Berkeley City Council Resolution No. 59,853-N.S. (hereafter "Resolution"). Vendor understands and agrees that the City may choose with whom it will maintain business relations and may refrain from contracting with those Business Entities which maintain business relationships with morally repugnant regimes. Vendor understands the meaning of the following terms used in the Resolution:

"Business Entity" means "any individual, firm, partnership, corporation, association or any other commercial organization, including parent-entities and wholly-owned subsidiaries" (to the extent that their operations are related to the purpose of the contract with the City).

"Oppressive State" means: **Tibet Autonomous Region and the Provinces of Abo, Kham and U-Tsang**

"Personal Services" means "the performance of any work or labor and shall also include acting as an independent contractor or providing any consulting advice or assistance, or otherwise acting as an agent pursuant to a contractual relationship."

Contractor understands that it is not eligible to receive or retain a City contract if at the time the contract is executed, or at any time during the term of the contract it provides Personal Services to:

- a. The governing regime in any Oppressive State.
- b. Any business or corporation organized under the authority of the governing regime of any Oppressive State.
- c. Any person for the express purpose of assisting in business operations or trading with any public or private entity located in any Oppressive State.

Vendor further understands and agrees that Vendor's failure to comply with the Resolution shall constitute a default of the contract and the City Manager may terminate the contract and bar Vendor from bidding on future contracts with the City for five (5) years from the effective date of the contract termination.

The undersigned is familiar with, or has made a reasonable effort to become familiar with, Vendor's business structure and the geographic extent of its operations. By executing the Statement, Vendor certifies that it complies with the requirements of the Resolution and that if any time during the term of the contract it ceases to comply, Vendor will promptly notify the City Manager in writing.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Results Based Accountability Evaluation / 20-11349-C**

I am unable to execute this Statement; however, Vendor is exempt under Section VII of the Resolution. I have attached a separate statement explaining the reason(s) Vendor cannot comply and the basis for any requested exemption.

Signature: _____ Date: _____

CITY OF BERKELEY
Living Wage Certification for Providers of Services

TO BE COMPLETED BY ALL PERSONS OR ENTITIES ENGAGING IN A CONTRACT FOR PERSONAL SERVICES WITH THE CITY OF BERKELEY.

The Berkeley Municipal Code Chapter 13.27, Berkeley's Living Wage Ordinance (LWO), provides that contractors who engage in a specified amount of business with the City (except where specifically exempted) under contracts which furnish services to or for the City in any twelve (12) month period of time shall comply with all provisions of this Ordinance. The LWO requires a City contractor to provide City mandated minimum compensation to all eligible employees, as defined in the Ordinance. In order to determine whether this contract is subject to the terms of the LWO, please respond to the questions below. Please note that the LWO applies to those contracts where the contractor has achieved a cumulative dollar contracting amount with the City. Therefore, even if the LWO is inapplicable to this contract, subsequent contracts may be subject to compliance with the LWO. Furthermore, the contract may become subject to the LWO if the status of the Contractor's employees change (i.e. additional employees are hired) so that Contractor falls within the scope of the Ordinance.

Section I.

1. IF YOU ARE A FOR-PROFIT BUSINESS, PLEASE ANSWER THE FOLLOWING QUESTIONS

a. During the previous twelve (12) months, have you entered into contracts, including the present contract, bid, or proposal, with the City of Berkeley for a cumulative amount of \$25,000.00 or more?

YES _____ **NO** _____

If **no**, this contract is NOT subject to the requirements of the LWO, and you may continue to Section II. If **yes**, please continue to question **1(b)**.

b. Do you have six (6) or more employees, including part-time and stipend workers?

YES _____ **NO** _____

If you have answered, "**YES**" to questions **1(a)** and **1(b)** this contract **IS** subject to the LWO. If you responded "NO" to **1(b)** this contract **IS NOT** subject to the LWO. **Please continue to Section II.**

2. IF YOU ARE A NON-PROFIT BUSINESS, AS DEFINED BY SECTION 501(C) OF THE INTERNAL REVENUE CODE OF 1954, PLEASE ANSWER THE FOLLOWING QUESTIONS.

a. During the previous twelve (12) months, have you entered into contracts, including the present contract, bid or proposal, with the City of Berkeley for a cumulative amount of \$100,000.00 or more?

YES _____ **NO** _____

If no, this Contract is NOT subject to the requirements of the LWO, and you may continue to Section II. If yes, please continue to question **2(b)**.

b. Do you have six (6) or more employees, including part-time and stipend workers?

YES _____ **NO** _____

If you have answered, "**YES**" to questions **2(a)** and **2(b)** this contract **IS** subject to the LWO. If you responded "NO" to **2(b)** this contract **IS NOT** subject to the LWO. **Please continue to Section II.**

Section II

Please read, complete, and sign the following:

THIS CONTRACT **IS** SUBJECT TO THE LIVING WAGE ORDINANCE.

THIS CONTRACT **IS NOT** SUBJECT TO THE LIVING WAGE ORDINANCE.

Attachment E

The undersigned, on behalf of himself or herself individually and on behalf of his or her business or organization, hereby certifies that he or she is fully aware of Berkeley's Living Wage Ordinance, and the applicability of the Living Wage Ordinance, and the applicability of the subject contract, as determined herein. The undersigned further agrees to be bound by all of the terms of the Living Wage Ordinance, as mandated in the Berkeley Municipal Code, Chapter 13.27. If, at any time during the term of the contract, the answers to the questions posed herein change so that Contractor would be subject to the LWO, Contractor will promptly notify the City Manager in writing. Contractor further understands and agrees that the failure to comply with the LWO, this certification, or the terms of the Contract as it applies to the LWO, shall constitute a default of the Contract and the City Manager may terminate the contract and bar Contractor from future contracts with the City for five (5) years from the effective date of the Contract termination. If the contractor is a for-profit business and the LWO is applicable to this contract, the contractor must pay a living wage to all employees who spend 25% or more of their compensated time engaged in work directly related to the contract with the City. If the contractor is a non-profit business and the LWO is applicable to this contract, the contractor must pay a living wage to all employees who spend 50% or more of their compensated time engaged in work directly related to the contract with the City.

These statements are made under penalty of perjury under the laws of the state of California.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Entity: _____

Contract Description/Specification No: **Results Based Accountability Evaluation / 20-11349-C**

Section III

- **** FOR ADMINISTRATIVE USE ONLY -- PLEASE PRINT CLEARLY ****

I have reviewed this Living Wage Certification form, in addition to verifying Contractor's total dollar amount contract commitments with the City in the past twelve (12) months, and determined that this Contract **IS / IS NOT** (circle one) subject to Berkeley's Living Wage Ordinance.

Department Name

Department Representative

To be completed by
Contractor/Vendor



**Form EBO-1
CITY OF BERKELEY**

CERTIFICATION OF COMPLIANCE WITH EQUAL BENEFITS ORDINANCE

If you are a **contractor**, return this form to the originating department/project manager. If you are a **vendor** (supplier of goods), return this form to the Purchasing Division of the Finance Dept.

SECTION 1. CONTRACTOR/VENDOR INFORMATION

Name:		Vendor No.:	
Address:	City:	State:	ZIP:
Contact Person:		Telephone:	
E-mail Address:		Fax No.:	

SECTION 2. COMPLIANCE QUESTIONS

- A. The EBO is inapplicable to this contract because the contractor/vendor has no employees.
 Yes No (If "Yes," proceed to Section 5; if "No," continue to the next question.)
- B. Does your company provide (or make available at the employees' expense) any employee benefits?
 Yes No
If "Yes," continue to Question C.
If "No," proceed to Section 5. (The EBO is not applicable to you.)
- C. Does your company provide (or make available at the employees' expense) any benefits to the spouse of an employee? Yes No
- D. Does your company provide (or make available at the employees' expense) any benefits to the domestic partner of an employee? Yes No

If you answered "No" to both Questions C and D, proceed to Section 5. (The EBO is not applicable to this contract.) If you answered "Yes" to both Questions C and D, please continue to Question E. If you answered "Yes" to Question C and "No" to Question D, please continue to Section 3.

- E. Are the benefits that are available to the spouse of an employee identical to the benefits that are available to the domestic partner of the employee? Yes No

**If you answered "Yes," proceed to Section 4. (You are in compliance with the EBO.)
If you answered "No," continue to Section 3.**

SECTION 3. PROVISIONAL COMPLIANCE

- A. Contractor/vendor is not in compliance with the EBO now but will comply by the following date:
 - By the first effective date after the first open enrollment process following the contract start date, not to exceed two years, if the Contractor submits evidence of taking reasonable measures to comply with the EBO; or
 - At such time that administrative steps can be taken to incorporate nondiscrimination in benefits in the Contractor's infrastructure, not to exceed three months; or
 - Upon expiration of the contractor's current collective bargaining agreement(s).

B. If you have taken all reasonable measures to comply with the EBO but are unable to do so, do you agree to provide employees with a cash equivalent?* Yes No

* The cash equivalent is the amount of money your company pays for spousal benefits that are unavailable for domestic partners.

SECTION 4. REQUIRED DOCUMENTATION

At time of issuance of purchase order or contract award, you may be required by the City to provide documentation (copy of employee handbook, eligibility statement from your plans, insurance provider statements, etc.) to verify that you do not discriminate in the provision of benefits.

SECTION 5. CERTIFICATION

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that I am authorized to bind this entity contractually. By signing this certification, I further agree to comply with all additional obligations of the Equal Benefits Ordinance that are set forth in the Berkeley Municipal Code and in the terms of the contract or purchase order with the City.

Executed this _____ day of _____, in the year _____, at _____, _____
(State) (City)

Name (please print)

Signature

Title

Federal ID or Social Security Number

FOR CITY OF BERKELEY USE ONLY

- Non-Compliant (The City may not do business with this contractor/vendor)
- One-Person Contractor/Vendor Full Compliance Reasonable Measures
- Provisional Compliance Category, Full Compliance by Date: _____
- Staff Name(*Sign and Print*): _____ Date: _____

CITY OF BERKELEY
Right to Audit Form

The contractor agrees that pursuant to Section 61 of the Berkeley City Charter, the City Auditor's office may conduct an audit of Contractor's financial, performance and compliance records maintained in connection with the operations and services performed under this contract.

In the event of such audit, Contractor agrees to provide the Auditor with reasonable access to Contractor's employees and make all such financial, performance and compliance records available to the Auditor's office. City agrees to provide Contractor an opportunity to discuss and respond to/any findings before a final audit report is filed.

Signed: _____ Date: _____

Print Name & Title: _____

Company: _____

Contract Description/Specification No: **Results Based Accountability Evaluation / 20-11349-C**

Please direct questions regarding this form to the Auditor's Office, at (510) 981-6750.

CITY OF BERKELEY
Commercial General and Automobile Liability Endorsement

The attached Certificates of Insurance are hereby certified to be a part of the following policies having the following expiration dates:

Policy No.	Company Providing Policy	Expir. Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The scope of the insurance afforded by the policies designated in the attached certificates is not less than that which is afforded by the Insurance Service Organization's or other "Standard Provisions" forms in use by the insurance company in the territory in which coverage is afforded.

Such Policies provide for or are hereby amended to provide for the following:

1. The named insured is _____.
2. CITY OF BERKELEY ("City") is hereby included as an additional insured with respect to liability arising out of the hazards or operations under or in connection with the following agreement:
 _____.

The insurance provided applies as though separate policies are in effect for both the named insured and City, but does not increase the limits of liability set forth in said policies.

3. The limits of liability under the policies are not less than those shown on the certificate to which this endorsement is attached.
4. Cancellation or material reduction of this coverage will not be effective until thirty (30) days following written notice to _____, Department of _____, Berkeley, CA.
5. This insurance is primary and insurer is not entitled to any contribution from insurance in effect for City.

The term "City" includes successors and assigns of City and the officers, employees, agents and volunteers.

 Insurance Company

Date: _____ By: _____
 Signature of Underwriter's
 Authorized Representative

Works-Wright, Jamie

From: Berkeley/Albany Mental Health Commission
Sent: Tuesday, October 15, 2019 4:52 PM
To: Works-Wright, Jamie
Subject: FW: Spread the word! Launch of the 2020-21 cycle of the Chancellor's Community Partnership Fund
Attachments: 2020_vision_overview_7.16.18.pdf; 2020-2021_ccpf_faqs.pdf; myprojectnamepre-applicationccpf_2020-21.docx; 2020-2021_ccpf_grant_guidelines.pdf

Hello Commissioners,

Please see the email and attachments

Thank you for your time.

Jamie Works-Wright

Consumer Liaison & Mental Health Commission Secretary

City of Berkeley

1521 University

Berkeley, CA 94703

jworks-wright@cityofberkeley.info

Office: 510-981-7721 ext. 7721

Cell #: 510-423-8365

From: jenloy@berkeley.edu [mailto:jenloy@berkeley.edu] **On Behalf Of** Calpartnershipfund Departmental
Sent: Tuesday, October 15, 2019 2:30 PM
To: Calpartnershipfund Departmental <calpartnershipfund@berkeley.edu>
Subject: Spread the word! Launch of the 2020-21 cycle of the Chancellor's Community Partnership Fund

Dear Community and Campus Partners,

We are pleased to announce the launch of the next grant cycle for Chancellor's Community Partnership Fund projects that will begin in the fall semester of 2020.

You might have received an [EventBrite invitation to the October 21 Community Mixer and Information Session](#) that has much of the same information below. (And thank you if you have already RSVPd!) At the request of many community members, we are sending along this email as well to make sure folks who are interested in the Partnership Fund get the information they need to spread the word and/or apply!

In the 2020-21 grant cycle the CCPF will make approximately \$300,000 in grants to innovative campus-community partnerships designed to improve the quality of life for Berkeley residents. Berkeley-based collaborative projects that focus on the arts and culture, economic development, environmental stewardship, education, and public health and community safety are encouraged to apply. Proposed projects must include at least **one university** and **one Berkeley community** partner.

Potential applicants are invited to attend a [Community Mixer and Information Session](#) to learn more about the application process and explore potential community and university

partnerships. CCPF board members and the staff that administer the grants will be on hand to answer questions. on Thursday, October 21, 4 to 5:30 pm at Berkeley City Hall (6th floor)

All grants will be for one-year projects or programs. Education-related grants applicants are required to demonstrate that their project is aligned with and furthers the objectives of the Berkeley 2020 Vision: Equity in Education.

The 2020 Vision is Berkeley's city-wide effort that strives to eliminate racial disparities in academic achievement in Berkeley's public schools. The 2020 Vision partners include: Berkeley Unified School District, the City of Berkeley, Berkeley City College, UC Berkeley and several community-based organizations.

Applicants must complete a Pre-Application form which is due December 13, 2019 before 5 pm. Eligible projects must have at least one community partner and one university partner. UC Berkeley student organizations that are actively supported by a faculty or staff advisor, are encouraged to apply. For more information download the Grant Guidelines and Frequently Asked Questions.

In partnership,

- Jen

Government and Community Relations
Chancellor's Community Partnership Fund
chancellor.berkeley.edu/gcr/local-community/ccpf

Overview

Berkeley's 2020 Vision: Equity in Education (“*Berkeley's 2020 Vision*”) is a citywide initiative that strives to eliminate racial disparities in academic achievement in Berkeley’s public schools. Berkeley has one of the nation’s widest achievement gaps between African American and Latino/a/x students and their white peers.ⁱ *Berkeley's 2020 Vision* seeks to eliminate these disparities through a shared community commitment to this goal: that all young people in Berkeley grow up with equitable opportunities to achieve high outcomes and realize their full potential.

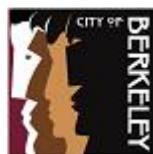
Berkeley's 2020 Vision was formally established in 2008 when the City of Berkeley (COB) joined with United in Action (a community-driven, multi-ethnic coalition), the Berkeley Unified School District (BUSD), and other key community stakeholders to issue a “call for urgent action to make educational success, equity, and outcomes...a communitywide priority.”ⁱⁱ The partners set a goal of high academic achievement for all Berkeley students, while placing a priority on closing the “opportunity gap”ⁱⁱⁱ for African American and Latino/a/x children and youth.

This initiative rests on the belief that the responsibility for ensuring that all children and youth have what they need to fulfill their potential extends beyond school walls to the entire community – to public agencies, community organizations, businesses, families, and more. To this end, *Berkeley's 2020 Vision's* stakeholders collaborate to align and strengthen systems, to leverage resources, and to create and increase access to opportunities that support young people’s success.

Berkeley’s City Manager’s Office coordinates *Berkeley's 2020 Vision*, in partnership with BUSD, Berkeley City College (BCC), and the University of California at Berkeley (UCB). Public agency, education, nonprofit, and other partners lend content expertise, shape the direction of this initiative, and represent the students and families they serve.

Local funders and institutional partners have aligned their funding to advance the goals of *Berkeley's 2020 Vision*. With this support, nonprofits and community agencies design and implement programs and services across Berkeley to “move the needle” on key indicators of student well-being and academic attainment.

Through these collective efforts, *Berkeley's 2020 Vision* strives to bridge our community’s “opportunity gap” by providing equitable learning opportunities for all Berkeley children and youth.



Our Priorities

Too many young people in Berkeley -- and a disproportionate share of our African American and Latino/a/x children and youth -- lack access to the resources and supports they need to succeed in school. *Berkeley's 2020 Vision's* partners are striving to close this "opportunity gap" by working together to expand and strengthen our work across six priority areas: Kindergarten Readiness, 3rd Grade Reading Proficiency, 8th Grade Math Proficiency, College and Career Readiness, Improved School Attendance and Health, and Community and Family Engagement.

These priorities span the course of a child's early education through high school graduation. Each priority is associated with a critical benchmark, demonstrated by research to link closely with a child's well-being and later academic success:

- **Kindergarten Readiness** closely aligns with future attainment and well-being in school and in life. Starting with prenatal care, early experiences and learning provide children with fundamental skills and foundations for life-long academic and socio-emotional success.^{iv}
- **3rd Grade Reading Proficiency** is the primary predictor of academic success and high school graduation. Children who learn to read by 3rd grade are more likely to complete high school and less likely to experience socio-emotional and behavioral problems. Reading by 3rd grade opens the doors to a world of learning opportunities as the transition begins from "learning to read" to "reading to learn."^v
- **8th Grade Math Proficiency** lays the foundation for succeeding in an increasingly collaborative and technical professional world. Students who master basic math are more likely to be successful in advanced math, which is strongly connected to future college enrollment and graduation.^{vi}
- **College and Career Readiness** empowers young people to complete high school, equipped to seize positive opportunities to advance in their education and/or career. Higher levels of educational attainment correlate with better health and well-being, and greater economic and career success.^{vii}
- **Improved School Attendance and Health** are important because children need to be in school to succeed in school. Students who are chronically absent miss out on important learning and can face a steep uphill climb to catch up with their peers. Chronic absences can also be a symptom of other challenges facing children or their families, including health problems (such as asthma), emotional trauma, housing stability, and parental stress.^{viii}
- **Community and Family Engagement** – including families, schools, government, nonprofits, businesses, academia, the faith community, and beyond – is perhaps the most critical component of fulfilling our shared commitment to the younger generation. Only through our steadfast engagement can *Berkeley's 2020 Vision* ensure that all Berkeley children and youth grow up with equitable opportunities to learn and thrive.

These priorities are inter-related; for example, how well children read in 3rd grade is connected to how prepared they are to start kindergarten and how consistently they attend school.^{ix} Measurable indicators aligned with each of these priorities capture how well we as a community are doing at fulfilling our commitment to educational equity for Berkeley children and youth.

Our Approach to Closing the “Opportunity Gap”

1 Kindergarten Readiness

Goal: All children enter kindergarten ready to learn.

Strategies: Increase access to affordable care for children ages 0-5; ensure high quality care for children ages 0-5; educate parents/guardians of children ages 0-5* about healthy child development and preparing for kindergarten; develop trauma-sensitive school and care environments for children ages 0-5*.

Indicator: % of kindergarteners who are “ready to learn” as demonstrated on BUSD’s Screening Assessment of sound/letter identification and rote counting.

Lead Partners:* BUSD, COB *includes prenatal

2 3rd Grade Reading Proficiency

Goal: Every student reads at or above grade level by the end of 3rd grade.

Strategies: Expand resources to support early grade literacy programs during school hours, extended day learning, and summer; provide tutoring, mentoring, and other academic support in and out of school; increase access to diverse, engaging, culturally relevant books and stories; empower families and community members to participate in and support literacy development.

Indicator: % of 3rd graders testing at target or higher on the Teachers College Reading and Writing Project assessment.

Lead Partners: BUSD, COB, UCB

3 8th Grade Math Proficiency

Goal: Every student performs math at or above grade level by the end of 8th grade.

Strategies: Provide professional development for K-8 math teachers, with a focus on middle school instruction; provide tutoring, mentoring, and other academic support in and out of school; empower families and community members to participate in and support math proficiency.

Indicator: % of 8th graders at baseline proficiency or above on the Smarter Balanced Assessment Summative (end-of-year) test.

Lead Partners: BUSD, UCB

4 Improved School Attendance and Health

Goal: Every student attends school regularly.

Strategies: Promote a positive TK-12 attendance culture; identify absent students quickly and offer supports to help students get back to class; provide skill-building and youth leadership activities; provide school- and community-based behavioral health services; deliver other strategies to address children and youth at risk of chronic absenteeism, school suspensions, and/or police contact.

Indicator: % of students who miss 10% or more of the school year.

Lead Partners: BUSD, COB

5 College and Career Readiness

Goal: Every student is prepared for success in both college and career.

Strategies: Expose K-12 students to post-secondary opportunities; provide cohort-based and 1:1 academic interventions and social supports; provide college preparedness and transition support; offer structured, hands-on opportunities to experience work; support dual enrollment and activities that create post-secondary momentum and degree/certificate completion; offer access to college scholarships (e.g., Berkeley Promise^{xi}).

Indicator: % of HS graduates who complete (with a “C” or higher) A-G courses required for UC/CSU admissions.

Lead Partners: BCC, BUSD, COB, UCB

6 Community and Family Engagement

Goal: Community stakeholders collaborate to strengthen and align systems, leverage resources, and create opportunities that support the success of all children and youth. Families and youth are engaged partners in efforts to advance educational equity.

Strategies: Under development.

Lead Partners: BUSD, COB

References and Notes

- ⁱ Reardon, S.F., Kalogrides, D., & Shores, K. (Forthcoming). The Geography of Racial/Ethnic Test Score Gaps. *The American Journal of Sociology* (cepa.stanford.edu/content/geography-raciaethnic-test-score-gaps)
- ⁱⁱ City of Berkeley Resolution, "2020 Vision for Berkeley's Children and Youth," June 24, 2008.
- ⁱⁱⁱ Opportunity gap refers to the differences in resources and opportunities available to students depending on their race, ethnicity, socioeconomic status, or other factors, and describes how these inequities often perpetuate lower educational attainment for certain groups of students.
- ^{iv} <http://www.cafc.ca.gov/>
- ^v Annie E. Casey Foundation, *Early Warning! Why Reading by the End of Third Grade Matters*, 2010.
- ^{vi} <https://www.childtrends.org/indicators/mathematics-proficiency/>
- ^{vii} Robert Wood Johnson Foundation, Commission to Build a Healthier America, *Education Matters for Health*, Sept. 2009.
- ^{viii} <http://www.attendanceworks.org/chronic-absence/the-problem/>
- ^{ix} Annie E. Casey Foundation, *Early Warning Confirmed! A Research Update on Third Grade Reading*, 2013.
- ^x The term "lead partners" here indicates which of the four main institutional stakeholders is coordinating the overall work plan for achieving a given goal. Many other partners play significant roles in each of these efforts.
- ^{xi} *Berkeley Promise* is a college access and matriculation scholarship initiative that supports low-income and/or first-generation college candidates with degree and/or certificate completion. It is led by the Berkeley Mayor's Office in partnership with BCC, COB, BUSD, and others.



CHANCELLOR'S COMMUNITY PARTNERSHIP FUND UNIVERSITY OF CALIFORNIA, BERKELEY

2200 Bancroft Way, Berkeley, CA 94720-4204
Tel.: 510/642-7860 E-mail: calpartnershipfund@berkeley.edu

2020-2021 GRANT GUIDELINES

Mission and Goals of the Fund

The UC Berkeley Chancellor's Community Partnership Fund (the Fund) supports projects and programs that establish, extend and/or strengthen collaborative partnerships between UC Berkeley and the wider Berkeley community. Therefore, it is required that proposed projects or programs have one community partner and one UC Berkeley partner. The Fund seeks to enhance the quality of life for people who live and work in Berkeley by linking the university's energy and resources with those of the community.

The Fund supports neighborhood improvement projects and community service programs that utilize collaborative relationships between UC Berkeley and the community to address critical needs in the following thematic areas:

- Arts and Culture
- Community Safety, Public Health and Wellness
- Economic Development
- Education
- Environmental Stewardship

Eligibility

Applicants:

All applicants, projects and/or programs must be based in the City of Berkeley and benefit Berkeley residents. All projects and programs must be a collaborative attempt of at least one community and UC Berkeley partner.

Applicants must *either* be tax-exempt, 501(c)(3) organizations *or* arrange for an eligible 501(c)(3) organization to serve as a fiscal sponsor. In the latter case, written confirmation by the 501(c)(3) organization of its willingness to act as fiscal agent is required.

Projects and Programs:

The Fund awards grants for neighborhood improvement projects and community service programs. For more information on past funded projects, please visit the Fund's website by clicking on the Chancellor's Community Partnership Fund link on the UC Berkeley Local Government and Community Relations main page: chancellor.berkeley.edu/gcr/local-community.

- *Neighborhood improvement projects* enhance the physical structures and environment in Berkeley. Past neighborhood improvement projects have been related to the restoration of historic landmarks, the beautification of parks and open spaces, and enhancing emergency and disaster preparedness. Specific activities have included the installation of street lights and park benches, the creation of murals and other public art installations, landscaping and tree planting. Activities that will eventually lead to a completed neighborhood improvement

project, including planning activities, feasibility studies, and needs assessments are also eligible for funding.

- *Community service programs* enhance the economic, social, and cultural well-being of Berkeley residents. Examples of past community service programs include: performing arts workshops, teacher training and mentoring, community-based cultural events, homeless outreach, and literacy after-school programs.

Thematic Areas:

Applicants are asked to align their project or program with one of the following themes:

- *Arts and Culture:* proposals aligned with this theme seek to expose the Berkeley community to a wide range of artistic, musical and cultural styles and practices. Projects or programs could include supporting or developing public art installations, performances, trainings, and workshops.
- *Community Safety, Public Health & Wellness:* proposals aligned with this theme aim to make Berkeley a safer, more welcoming, healthier and more equitable community. Projects and programs could focus on a range of subjects, including but not limited to the following for public safety: safety crime prevention, emergency preparedness, pedestrian and bike safety, increased street lighting and vegetation management, conflict resolution, etc. We have recently broadened this category to include projects and programs that address issues of public health and wellness and consider the health of the Berkeley population as a whole and includes factors that result in health disparities such as socioeconomic conditions, environmental quality and the quality of the built environment. Proposals that seek to address issues facing Berkeley's homeless population might well fit in this category.
- *Economic Development:* proposals aligned with this theme aim to encourage and support economic development regionally and locally. The Fund encourages research, studies, marketing and other collaborative initiatives and partnerships that bolster the local and "green" economy, encourage job creation, etc. Please note that projects must serve a public as opposed to private benefit.
- *Education:* proposals aligned with this theme aim to enhance the educational experience of Berkeley residents. Projects or programs could involve mentoring activities, coaching and other after-school programs, writing workshops, adult literacy programs and classroom or community presentations and events. Education proposals should align with and forward the goals of Berkeley's 2020 Vision: Equity in Education.
- *Environmental Stewardship:* proposals aligned with this theme aim to protect, preserve and/or restore Berkeley's natural environment. Projects or programs could focus on issues linked to sustainability and ecological education, recycling and reuse programs, energy-efficiency and renewable energy, green business, and clean-up projects.

Permits:

It is the responsibility of the applicant to secure any required permits and other such approvals from the City of Berkeley in advance of the full grant application for projects that affect the city's infrastructure. If

such permits and approvals are not secured by the application due date, grant funding is contingent on securing the required approvals by the grant disbursement date. Applicants first provide a pre-application and are invited to submit a full application during the spring semester.

Partnerships:

The Fund seeks to fund projects that foster, encourage and enhance significant partnership and collaboration between the university and the community. Interested applicants should begin identifying and contacting potential partners early in the application process. Assistance in connecting with potential university partners will be provided by the UC Berkeley's Office of Local Government and Community Relations. A Community Mixer and information session in the fall will provide an opportunity to meet and network with potential partners.

All projects and programs must include significant collaboration and partnership between at least one eligible community-based partner and one eligible university partner.

- Eligible community partners include but are not limited to:
 - Neighborhood, civic and merchant associations
 - Primary, secondary, and post-secondary schools
 - Community-based organizations, such as social service and faith-based organizations
 - Local governmental departments, agencies and commissions
- Eligible university partners include:
 - UC Berkeley departments and/or faculty
 - Non-academic campus departments and/or staff
 - Students and/or student organizations (in conjunction with at least one staff or faculty advisor)

In order to enhance collaboration, reasonable stipends may be awarded to university and/or community partners to secure participation and provide specialized expertise.

Application Process and Guidelines

Application Review and Evaluation

Pre-Application Phase:

The Fund's Advisory Board, whose members include representatives from the university, city and community, will review the submitted Pre-Application Forms and select approximately 20-25 proposals that will be asked to submit a full application packet. The Advisory Board may also provide written feedback to select applicants with the goal of creating and strengthening partnerships between the campus and community. Please note that being asked to submit an application does not guarantee a grant award.

Application Phase:

The Advisory Board will review and score applications using the following criteria: Strength and depth of partnership; support of Fund's mission and goals; project design and implementation plan; outcomes and performance measures; budget, financials and ability to leverage additional funds; and organizational capacity.

Submission Guidelines

All interested applicants should complete and submit the Pre-Application Form available on the Fund's website or you may request an electronic copy directly from the Fund. Incomplete Pre-Application Forms will not be reviewed.

Pre-Application Forms must be submitted electronically to the Fund **no later than 5:00 pm, December 13, 2019**. Late submissions will not be accepted. Please email completed Pre-Application Forms to calpartnershipfund@berkeley.edu.

Community Mixer

Applicants are invited to attend an informational meeting and community mixer in the fall. Visit the Fund website to RSVP. Fund Advisory Board members and UC Berkeley staff will describe the grant program and the application and review processes, respond to questions and provide an opportunity for interested applicants to network with potential partners. While attendance is encouraged, it is not mandatory and will not affect the evaluation of applications.

Additional information about the community mixer and the application documents may also be found on the Chancellor's Community Partnership Fund page on the UC Berkeley Office of Local Government and Community Relations website: chancellor.berkeley.edu/gcr/local-community.

Funding Terms and Restrictions

Award Amount and Duration:

Recently, the range of grants has been between \$5,000 and \$25,000. However, under special but rare circumstances, we will consider grants for larger amounts. Please note that most awards average between \$10,000 and \$15,000.

For the 2020-2021 grant cycle, approximately \$300,000 will be allocated for distribution. The Fund is not required to fully allocate all available funds during each grant cycle. Unallocated funds will be carried forward for future distribution.

Terms and Conditions:

Grant recipients will be required to execute a Terms and Conditions document before funds will be disbursed as well as become an approved UC Berkeley Vendor. Funding will be allocated on an annual basis. And at this time the Fund is only awarding one-year grants.

To avoid dependency on the Fund, projects or programs that re-apply for a consecutive year of funding must demonstrate they are not solely reliant on the partnership grants and that they are effectively leveraging resources from other sources.

Reporting:

Grants must submit a progress report (due by February 26, 2021) and a final project report (due by September 30, 2021).

Restrictions:

Funding may not be used for the following activities and expenses:

- a. Political programs or activities to support, change, lobby, or otherwise influence legislation and/or ballot measures, elect candidates to public office, or other political issues.
- b. Religious activities; however, religious institutions may apply for funding for nonsectarian projects.
- c. Any organization that discriminates on the basis of age, gender, race, ethnicity, religion, disability, sexual orientation, national origin, or political affiliation. The Fund may support organizations and projects that target groups that have been subject to historical discrimination.
- d. Deficit or emergency funding, debt reduction, loan repayment or retirement, or for project costs incurred before the effective date of the grant.
- e. Purchase or long-term real estate rental(s), lease(s), or sub-lease(s).
- f. Projects that exclusively benefit UC Berkeley faculty, staff, or students. (University faculty, staff and students are eligible, as are community partners, for reasonable stipend amounts for their work on approved projects.)
- g. Purchase of alcoholic beverages. (Use of grant funds for food and light refreshments is discouraged but will be reviewed on a case by case basis.)

Recognition and Publicity:

All grant recipients are required to recognize the Fund for its support of the project or program by using the logo of the University of California, Berkeley (which will be provided by the Fund to grant recipients) and the following language: "This [project or program] was made possible by the generous support of the UC Berkeley Chancellor's Community Partnership Fund." Alternative language or images must be approved in writing by the Director of Local Government and Community Relations.

Neighborhood Improvement projects are required to install a physical marker, such as a plaque or inscription, and community service programs should recognize the Fund in their publicity materials, such as brochures, press releases, websites, etc.

All funded projects or programs will be asked to provide copies of any printed, web-based or other publicity materials. The University of California, Berkeley retains the right to publish information about the Fund and its grant recipients in its own materials. The use of the name and logo of the University of California, Berkeley requires prior written approval.

Questions and Additional Information

If you have questions about the grant program or need assistance with a project idea, contact UC Berkeley's Office of Government and Community Relations by phone at (510) 642-7860, or via email at calpartnershipfund@berkeley.edu.

Updated 10/23/2019 GCR

CHANCELLOR'S COMMUNITY PARTNERSHIP FUND

UNIVERSITY OF CALIFORNIA, BERKELEY

2200 Bancroft Way, Berkeley, CA 94720-4204

Tel.: 510/642-7860 E-mail: calpartnershipfund@berkeley.edu

Frequently Asked Questions

2020-2021 Chancellor's Community Partnership Fund

Topics

- I. Eligibility
- II. Partnerships
- III. Projects and Programs
- IV. Funding Rules and Budgets
- V. Application Review and Evaluation

Eligibility:

1. Do I have to be based in Berkeley to be eligible for funding?

Yes. All projects and programs must be implemented by Berkeley-based partners for the benefit of Berkeley residents.

2. Can a neighborhood group that is not a 501(c)(3) organization apply?

Yes. An organization that is not a 501(c)(3) can apply for a grant, but it must arrange for a 501(c)(3) organization to serve as its fiscal sponsor. Many local non-profit 501(c)(3) organizations serve as fiscal sponsors (generally for a modest fee).

3. Does my fiscal agent have to be based in Berkeley?

No. Fiscal agents for those applicants who do not have 501(c)(3) status do not need to be based in Berkeley.

4. Can a fiscal agent provide their services to more than one grant proposal?

Yes. There is no limit on the number of proposals a fiscal agent can support.

5. Does my project have to align with one of the five thematic areas outlined in the grant information document and grant application?

Not necessarily. While all proposals are strongly encouraged to tailor their proposal to align with one of the grant themes (community safety/public health & wellness, environmental stewardship, education, economic development and arts and culture), this is not a requirement.

6. Our project or program has components that could fit more than one of the Fund's thematic areas (community safety/public health & wellness, environmental stewardship, education, economic development, arts and culture). Should we select more than one theme?

The Fund asks that you select one theme that you believe best describes and encompasses your project or program, even if there are components of your proposal that may align with other themes.

7. Does our education program or project have to align with the [Berkeley's 2020 Vision: Equity in Education](#)?

Yes. You will need to familiarize yourself with the 2020 Vision: Equity in Education and describe in your application how your program and project align with and forward this work Below is some information from the 2020 Vision for Berkeley's Children and Youth and more information can be found here: www.berkeleyschools.net/about-the-district/2020vision

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The 2020 Vision for Berkeley's Children and Youth is a collective impact partnership dedicated to improving outcomes for African American, Latino and other student groups that have been historically underrepresented in higher education. In addition to supporting Berkeley Unified's equity-based reform efforts, the partners, which include City of Berkeley, Berkeley City College, and UC Berkeley work to align their education related programs to further the 2020 Vision's goals and progress indicators. While the original vision for the partnership was to end racially predictable disparities in student achievement among Berkeley's children and youth by 2020, recently the partners have also committed to providing support to Berkeley High School graduates through a new Berkeley Promise scholarship.

Education focused CCPF applicants must demonstrate how their project/ program is aligned with the 2020 Vision and furthers at least one the following 2020 Vision Achievement Goals or Progress Indicators: Kindergarten Readiness, 3rd Grade Reading Proficiency, Mastery of Eighth-Grade Math, College and Career Readiness, Student Engagement & Agency (Student Opportunities and Support, Attendance, Disproportionality in Suspensions, Disproportionality Police Contacts).

See appendix for more information the 2020 Vision and the indicators or visit: <https://www.cityofberkeley.info/2020-vision/>

Partnerships:

8. What constitutes a university partner? How involved does a university partner have to be?

A university partner could be any or all of the following: an academic department, a non-academic unit, an organized student group, or individual faculty, staff, or student. Partnerships can take many forms, but it is important that each partner play a meaningful role in some or all aspects of the program, e.g., creation, development, and implementation.

9. What if I do not have a university or community partner?

All projects and programs must include at least one eligible community and university partner (see Grant Guidelines document for eligibility requirements) and the degree of collaboration and interaction between partners will be an important factor in determining which proposals receive funding.

Building relationships between university and community partners can take a considerable amount of time and planning and should not be rushed for the sake of grant funding. We encourage all interested applicants to start making connections early in the application process.

If you are interested in finding ways to identify or network with prospective university partners, please e-mail calpartnershipfund@berkeley.edu or call 510.642-7860.

10. Can I have more than one partner?

Yes. Proposals that bring together a number of community and university partners are encouraged. Please keep in mind that it is the strength and depth of the partnership, and not simply the number of partners, that characterizes a successful grant proposal.

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11. Are the City of Berkeley, the Berkeley Unified School District and other public agencies eligible as community partners?

Yes. Primary, secondary and post-secondary schools and local governmental departments, agencies and commissions are eligible community partners.

12. Does each partner have to contribute money to the project? Do we need to show this on the budget worksheet (if asked to submit a full application)?

It is not required that partners contribute funds to the project. If some partners are providing in-kind contributions, such as supplies or staffing, this should be indicated on the budget worksheet and narrative if your organization is asked to submit a full application.

Projects and Programs:

13. Does my project or program need to benefit Berkeley residents?

Yes. All projects and programs must be implemented by Berkeley-based partners for the benefit of Berkeley residents.

14. What is the difference between neighborhood improvement projects and community service programs?

Neighborhood improvement projects enhance the physical structures and environment in Berkeley. They include, but are not limited to, activities such as the installation of street lights and park benches, the creation of murals and other public art installations, landscaping and tree planting. Activities that will eventually lead to a completed neighborhood improvement project, including planning activities, feasibility studies, and needs assessments are also eligible for funding as a neighborhood improvement project.

Community service programs enhance the economic, social, and/or cultural wellbeing of Berkeley residents through activities such as performing arts workshops, teacher training and mentoring, community-based cultural events, outreach to the homeless, and literacy and after-school programs.

15. Does a neighborhood improvement project have to be in a publicly-accessible area?

Although the guidelines do not specifically state that a neighborhood improvement project must be in a publicly-accessible area, the application must make a compelling case how a location that is not publicly accessible provides a public benefit, fulfills the mission of the Fund, and meets the other criteria.

16. Is public art fundable?

Yes. Public art would be considered a neighborhood improvement project. Please keep in mind that the grant application must demonstrate that the proposed project has stakeholder endorsement and if it affects the city's infrastructure or requires approval by or permits from the City of Berkeley, such approvals must be secured in advance of the grant application. If not, grant funding might be contingent on securing the required approvals.

17. Can a neighborhood improvement project be considered if it has not received the use permits, landmarks, and zoning clearances needed to get started?

Yes. A project can be considered before receiving the required City of Berkeley approvals. If a grant is awarded, funding would be contingent on securing the required approvals. If you are asked to submit a full application,

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you should explain what approvals are required and the process and timeline for obtaining them. Full applications that require permits or approvals should also include a letter or support or approval from the Berkeley City Manager's Office documenting that contact has been made with the relevant City offices and agencies. All interested applicants should notify the relevant City of Berkeley agencies of their proposed projects as early in the grant application process as possible.

18. If we receive a grant this year, can we apply again for continued funding for the same program next year?

Yes. But requests for continued funding will not necessarily be given a priority over new grant requests. Since your application for another grant will be reviewed before your current project is completed, the application should reference and update your progress report, especially with respect to continued funding.

Funding Rules and Budgets:

19. What is the total amount that can be allocated for projects in 2020-2021?

The total available to allocate to grant proposals in 2020-2021 is approximately \$300,000. Recently, the range of grants has been between \$5,000 and \$25,000. However, under special and rare circumstances we will consider grants for larger amounts. Please note that most awards average between \$10,000 and \$15,000.

20. Will all grant awards be for the full amount requested?

Not necessarily. The Fund often awards grants for less than the amount requested when it is determined by the Fund and the applicant that the project or program is still feasible with reduced funding.

Applicants, especially those proposing large projects involving several phases or components, are encouraged to explain in their budget narrative which aspects of their proposal could stand alone.

Questions 19-26 apply to the Budget Worksheet that accompanies the Full Application and are not necessarily relevant during the Pre-Application phase. The below will be itemized on the Full Application.

21. What should be included in budget narrative? Do we have to justify/explain each budget item?

The budget narrative provides an opportunity for the applicant to justify and explain the costs outlined in your budget worksheet. It is not necessary to explain each budget item but the narrative should provide an overall picture of the budget plan for your project and explain how you arrived at these costs and their role in implementing the project.

22. How is the organizational budget different from the project budget?

The organizational budget should give a snapshot of the budget for the primary community partner's organization. The project budget should include only items related to the proposed grant funded project or program, and include any additional funding that might have been secured to help fund the proposed project or program.

23. When preparing my budget information for my application, how much should I allocate to indirect costs (also known as administrative expense or overhead cost)?

A guideline of 10-15% of the total amount of the project may be allocated to be used for indirect costs.

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24. If our fiscal agent is charging a service fee (either flat fee or percentage), should that cost be included in our budget?

Yes.

25. How do you value in-kind contributions?

In-kind donations are non-cash donations of goods, services, equipment, supplies, etc. In determining the value of in-kind contributions, the IRS suggests researching their fair market value, or what these goods or services would cost on the open market. For more information on charitable donations and determining the value of donated property, please see IRS Publications 526 and 561. Both publications are available for viewing and download at <http://www.irs.gov>.

26. How detailed should the budget for a neighborhood improvement project be? Do we need written estimates from contractors?

There must be some reasonable basis for the costs included in the budget, but you do not have to submit a detailed estimate from a contractor. Consulting fees and materials should be cost out, that is, the budget must be more detailed than a general line item for materials. Describe how you arrived at the cost estimate in your budget narrative.

27. What are the funding restrictions?

Funds may not be used for:

- Political programs or activities to support, change, lobby, or otherwise influence legislation and/or ballot measures, elect candidates to public office, or other political issues.
- Religious activities; however, religious institutions may apply for funding for nonsectarian projects.
- Any organization that discriminates on the basis of age, gender, race, ethnicity, religion, disability, sexual orientation, national origin, or political affiliation. The Fund may support organizations and projects that target groups that have been subject to historical discrimination.
- Deficit or emergency funding, debt reduction, loan repayment or retirement, or for project costs incurred before the effective date of the grant.
- Purchase or long-term real estate rental(s), lease(s), or sub-lease(s).
- Projects that exclusively benefit UC Berkeley faculty, staff, or students.
- Purchase of alcoholic beverages. (Use of grant funds for food and light refreshments is discouraged but will be reviewed on a case-by-case basis.)

28. Can grant funds be used to purchase equipment?

Yes. Equipment necessary to complete a project or program can be purchased with grant funds. These purchases should be itemized and explained in the budget worksheet and narrative.

29. Can part of the grant amount being requested be used to recompense the university and/or community partners for their contributions to the project?

Generally, yes. Please be aware of the following:

- Grant funds can be used to pay community members and/or staff, as well as UC Berkeley students as long as the arrangement complies with all applicable laws and regulations.
- Salaries for staff must be for time working on the project.
- Grant funds cannot be used to supplant already existing operational funds.

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- Undergraduate students may be entitled to work-study financial aid, which results in a reduced cost for the employing organization.
- Stipend amounts should be reasonable and correspond to the amount of time an individual is expected to work on a project or program and the unique expertise, professional or otherwise, which they bring to the project or program.

30. How should stipends be documented for tax purposes?

Tax reporting requirements depend on the current tax status of the lead applicant or fiscal agent and the nature of the work being performed. The financial advisor for the lead applicant or fiscal agent should be able to provide more detailed information regarding tax reporting requirements.

Application Review and Evaluation:

31. Who will be reviewing the applications?

The Chancellor's Community Partnership Fund Advisory Board will review and score the Pre-Application Forms and the full applications. Staff support will be provided by UC Berkeley's Office of Government and Community Relations. Funding recommendations will then be submitted to the Chancellor for approval.

32. Is there an appeal process?

No. The recommendations of the Advisory Board and the decision of the Chancellor are final and there is no appeal process.

Updated 9/23/2019, GCR

Appendix:

Berkeley's 2020 Vision: Equity in Education (7.16.18)

Overview

Berkeley's 2020 Vision: Equity in Education ("Berkeley's 2020 Vision") is a citywide initiative that strives to eliminate racial disparities in academic achievement in Berkeley's public schools. Berkeley has one of the nation's widest achievement gaps between African American and Latino/a/x students and their white peers.ⁱ Berkeley's 2020 Vision seeks to eliminate these disparities through a shared community commitment to this goal: that all young people in Berkeley grow up with equitable opportunities to achieve high outcomes and realize their full potential.

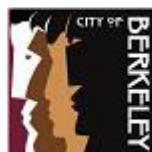
Berkeley's 2020 Vision was formally established in 2008 when the City of Berkeley (COB) joined with United in Action (a community-driven, multi-ethnic coalition), the Berkeley Unified School District (BUSD), and other key community stakeholders to issue a "call for urgent action to make educational success, equity, and outcomes...a communitywide priority."ⁱⁱ The partners set a goal of high academic achievement for all Berkeley students, while placing a priority on closing the "opportunity gap"ⁱⁱⁱ for African American and Latino/a/x children and youth.

This initiative rests on the belief that the responsibility for ensuring that all children and youth have what they need to fulfill their potential extends beyond school walls to the entire community – to public agencies, community organizations, businesses, families, and more. To this end, Berkeley's 2020 Vision's stakeholders collaborate to align and strengthen systems, to leverage resources, and to create and increase access to opportunities that support young people's success.

Berkeley's City Manager's Office coordinates Berkeley's 2020 Vision, in partnership with BUSD, Berkeley City College (BCC), and the University of California at Berkeley (UCB). Public agency, education, nonprofit, and other partners lend content expertise, shape the direction of this initiative, and represent the students and families they serve.

Local funders and institutional partners have aligned their funding to advance the goals of Berkeley's 2020 Vision. With this support, nonprofits and community agencies design and implement programs and services across Berkeley to "move the needle" on key indicators of student well-being and academic attainment.

Through these collective efforts, Berkeley's 2020 Vision strives to bridge our community's "opportunity gap" by providing equitable learning opportunities for all Berkeley children and youth.



Berkeley's 2020 Vision: Equity in Education (7.16.18)

Our Priorities

Too many young people in Berkeley -- and a disproportionate share of our African American and Latino/a/x children and youth -- lack access to the resources and supports they need to succeed in school. Berkeley's 2020 Vision's partners are striving to close this "opportunity gap" by working together to expand and strengthen our work across six priority areas: Kindergarten Readiness, 3rd Grade Reading Proficiency, 8th Grade Math Proficiency, College and Career Readiness, Improved School Attendance and Health, and Community and Family Engagement.

These priorities span the course of a child's early education through high school graduation. Each priority is associated with a critical benchmark, demonstrated by research to link closely with a child's well-being and later academic success:

- Kindergarten Readiness closely aligns with future attainment and well-being in school and in life. Starting with prenatal care, early experiences and learning provide children with fundamental skills and foundations for life-long academic and socio-emotional success.^{iv}
- 3rd Grade Reading Proficiency is the primary predictor of academic success and high school graduation. Children who learn to read by 3rd grade are more likely to complete high school and less likely to experience socio-emotional and behavioral problems. Reading by 3rd grade opens the doors to a world of learning opportunities as the transition begins from "learning to read" to "reading to learn."^v
- 8th Grade Math Proficiency lays the foundation for succeeding in an increasingly collaborative and technical professional world. Students who master basic math are more likely to be successful in advanced math, which is strongly connected to future college enrollment and graduation.^{vi}
- College and Career Readiness empowers young people to complete high school, equipped to seize positive opportunities to advance in their education and/or career. Higher levels of educational attainment correlate with better health and well-being, and greater economic and career success.^{vii}
- Improved School Attendance and Health are important because children need to be in school to succeed in school. Students who are chronically absent miss out on important learning and can face a steep uphill climb to catch up with their peers. Chronic absences can also be a symptom of other challenges facing children or their families, including health problems (such as asthma), emotional trauma, housing stability, and parental stress.^{viii}
- Community and Family Engagement – including families, schools, government, nonprofits, businesses, academia, the faith community, and beyond – is perhaps the most critical component of fulfilling our shared commitment to the younger generation. Only through our steadfast engagement can Berkeley's 2020 Vision ensure that all Berkeley children and youth grow up with equitable opportunities to learn and thrive.

These priorities are inter-related; for example, how well children read in 3rd grade is connected to how prepared they are to start kindergarten and how consistently they attend school.^{ix} Measurable indicators aligned with each of these priorities capture how well we as a community are doing at fulfilling our commitment to educational equity for Berkeley children and youth.

Berkeley's 2020 Vision: Equity in Education (7.16.18)

Our Approach to Closing the "Opportunity Gap"

1 Kindergarten Readiness

Goal: All children enter kindergarten ready to learn.

Strategies: Increase access to affordable care for children ages 0-5; ensure high quality care for children ages 0-5; educate parents/guardians of children ages 0-5* about healthy child development and preparing for kindergarten; develop trauma-sensitive school and care environments for children ages 0-5*.

Indicator: % of kindergarteners who are "ready to learn" as demonstrated on BUSD's Screening Assessment of sound/letter identification and rote counting.

Lead Partners: * BUSD, COB *includes prenatal

2 3rd Grade Reading Proficiency

Goal: Every student reads at or above grade level by the end of 3rd grade.

Strategies: Expand resources to support early grade literacy programs during school hours, extended day learning, and summer; provide tutoring, mentoring, and other academic support in and out of school; increase access to diverse, engaging, culturally relevant books and stories; empower families and community members to participate in and support literacy development.

Indicator: % of 3rd graders testing at target or higher on the Teachers College Reading and Writing Project assessment.

Lead Partners: BUSD, COB, UCB

3 8th Grade Math Proficiency

Goal: Every student performs math at or above grade level by the end of 8th grade.

Strategies: Provide professional development for K-8 math teachers, with a focus on middle school instruction; provide tutoring, mentoring, and other academic support in and out of school; empower families and community members to participate in and support math proficiency.

Indicator: % of 8th graders at baseline proficiency or above on the Smarter Balanced Assessment Summative (end-of-year) test.

Lead Partners: BUSD, UCB

4 Improved School Attendance and Health

Goal: Every student attends school regularly.

Strategies: Promote a positive TK-12 attendance culture; identify absent students quickly and offer supports to help students get back to class; provide skill-building and youth leadership activities; provide school- and community-based behavioral health services; deliver other strategies to address children and youth at risk of chronic absenteeism, school suspensions, and/or police contact.

Indicator: % of students who miss 10% or more of the school year.

Lead Partners: BUSD, COB

5 College and Career Readiness

Goal: Every student is prepared for success in both college and career.

Strategies: Expose K-12 students to post-secondary opportunities; provide cohort-based and 1:1 academic interventions and social supports; provide college preparedness and transition support; offer structured, hands-on opportunities to experience work; support dual enrollment and activities that create post-secondary momentum and degree/certificate completion; offer access to college scholarships (e.g., Berkeley Promise^{xi}).

Indicator: % of HS graduates who complete (with a "C" or higher) A-G courses required for UC/CSU admissions.

Lead Partners: BCC, BUSD, COB, UCB

6 Community and Family Engagement

Goal: Community stakeholders collaborate to strengthen and align systems, leverage resources, and create opportunities that support the success of all children and youth. Families and youth are engaged partners in efforts to advance educational equity.

Strategies: Under development.

Lead Partners: BUSD, COB



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Berkeley's 2020 Vision: Equity in Education (7.16.18)

References and Notes

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- ⁱ Reardon, S.F., Kalogrides, D., & Shores, K. (Forthcoming). The Geography of Racial/Ethnic Test Score Gaps. The American Journal of Sociology (cepa.stanford.edu/content/geography-raciaethnic-test-score-gaps)
- ⁱⁱ City of Berkeley Resolution, "2020 Vision for Berkeley's Children and Youth," June 24, 2008.
- ⁱⁱⁱ Opportunity gap refers to the differences in resources and opportunities available to students depending on their race, ethnicity, socioeconomic status, or other factors, and describes how these inequities often perpetuate lower educational attainment for certain groups of students.
- ^{iv} <http://www.cafc.ca.gov/>
- ^v Annie E. Casey Foundation, Early Warning! Why Reading by the End of Third Grade Matters, 2010.
- ^{vi} <https://www.childtrends.org/indicators/mathematics-proficiency/>
- ^{vii} Robert Wood Johnson Foundation, Commission to Build a Healthier America, Education Matters for Health, Sept. 2009.
- ^{viii} <http://www.attendanceworks.org/chronic-absence/the-problem/>
- ^{ix} Annie E. Casey Foundation, Early Warning Confirmed! A Research Update on Third Grade Reading, 2013.
- ^x The term "lead partners" here indicates which of the four main institutional stakeholders is coordinating the overall work plan for achieving a given goal. Many other partners play significant roles in each of these efforts.
- ^{xi} Berkeley Promise is a college access and matriculation scholarship initiative that supports low-income and/or first-generation college candidates with degree and/or certificate completion. It is led by the Berkeley Mayor's Office in partnership with BCC, COB, BUSD, and others.

2020-2021 Pre-Application Form

APPLICATION DEADLINE: December 13, 2019 no later than 5:00pm

To submit, email your Pre-Application form to calpartnershipfund@berkeley.edu. You can also mail your Pre-Application to the address above.

Instructions:

Click inside the boxes to input information. They will expand as you type. To use automatic checkboxes, double-click the checkbox and select "checked" in the default value list that will pop-up on your screen and click "OK."

Naming Your Preapplication: Please save your pre-application with the name of your project/program first, in the following format: OurProjectNamePreApplicationCCPF2020-21.docx

I. Project /Program Information

Project/Program Title:	
Total Amount Requested:	

Please check one to indicate program or project type:

- Community Service Program
- Neighborhood Improvement Project

Fund Themes: (check one)

- Arts and Culture
- Community Safety, Public Health and Wellness
- Economic Development
- Education*
- Environmental Stewardship

**Note: Applicants for education grants must demonstrate how program activities align with and further the vision for Berkeley's 2020 Vision: Equity in Education.*

II. Partner Information

Applicant/Primary Community Partner Information

The **primary community partner** will be responsible for implementing the proposed project and fulfilling the terms of the grant.

Name of Community Organization	
Mailing Address	
Contact Person's Name and Title	
Contact Person's E-Mail Address	
Contact Person's Telephone Number	

III. Non-Profit Status**

Funds will be distributed **only** to tax exempt organizations qualifying under Internal Revenue Code section 501(c)(3). An applicant that is not a 501(c)(3) organization must designate one to serve as fiscal sponsor. The IRS determination letter issued to the applicant or fiscal sponsor **and** a letter from the fiscal sponsor confirming its willingness to serve in that role (as appropriate) must be attached to the application. Please indicate whether:

- The applicant is a 501(c)(3) organization.
- The applicant is not a 501(c)(3) organization and will be seeking a fiscal sponsor.

** Applicants without non-profit tax status who are asked to submit a full application will need to secure the services of a fiscal agent before the application deadline.

IV. Primary University Partner Information

Please provide the following information for the primary university partner.

Name of Organization, Department, or Staff Unit at UC Berkeley	
Mailing Address	
Contact Person's Name and Title	
Contact Person's E-Mail Address	
Contact Person's Telephone Number	

Status of the Primary University Partner

- Confirmed:** Partner has agreed to participate
- Pending:** Partner has asked to participate and expressed interest
- Prospective:** Partners has not been asked to participate

If the **Primary University Partner** is a **student** or **student group**, please include the name and contact information for the **Faculty/Staff Advisor***** below.

Faculty/Staff Advisor	
Title, Department/Unit	
E-Mail Address	
Telephone Number	

***During the pre-application process, student organizations do not need to list a Faculty/Staff Advisor. Those partnerships that are asked to complete a Full Application will need a Faculty/Staff Advisor for student groups who are identified as the Primary University Partner.

V. Other Potential Partners (optional)

Please list other community or university partners that you would partner with on this project. Also indicate whether these potential partners are: 1) confirmed, 2) pending, or 3) prospective (see

above definitions). Additional partners can be added to the table below, or may be attached on a separate sheet of paper, if necessary.

Potential Partners	Status (confirmed, pending, prospective)
1)	
2)	
3)	
4)	
5)	

VI. Project and Partnership Narrative

The Fund supports well organized campus-community partnerships that undertake result-oriented projects and programs that demonstrate a clear benefit for Berkeley residents. Please provide information about your partnership and the brief description of the projects and or activities you plan to carry out.

A. Project Summary (not to exceed 300 words)

The Fund supports well organized campus-community partnerships that undertake result-oriented projects and programs that demonstrate a clear benefit for Berkeley residents. Please provide information about your partnership and the brief description of the projects and or activities you plan to carry out. Your Project Summary should include:

1) A description of critical community (and/or neighborhood) need or issue addressed by the proposal. Your description should identify the target population that will benefit from your program and explain how this work will improve Berkeley. Note that the beneficiaries of the Partnership Fund must be Berkeley residents/students.

2) An overview of the activities you will carry out and the outcomes you expect to achieve. Education-focused projects must demonstrate how the proposed project activities are aligned with and further the vision for Berkeley’s 2020 Vision: Equity in Education. For more information visit <https://www.cityofberkeley.info/2020-vision>.

3) An explanation of how requested funds will be allocated.

Project Summary word count: _____

not to exceed 300 words

B. Partnership Summary (not to exceed 300 words)

One of the main goals of the Fund is to establish and strengthen meaningful, collaborative partnerships between the university and community. Briefly identify the existing and potential partners on this proposal and their roles in the planning, design, and/or implementation of proposed activities. Please also describe the organizational capacity of identified partners to successfully carry out the proposal if funding is awarded.

Project Summary word count: _____

not to exceed 300 words

VII. Electronic Signature

By entering your name, title, organization, and date below you are agreeing that: You are an authorized representative of the organization(s) identified on the Pre-Application Form and that the information you have included in this document and other supporting materials is to the best of your knowledge true and accurate.

Name:

Title:

Organization:

Date:

Last Revised 10/23/19