

THE INFORMATION IN THIS BOX IS NOT A PART OF THE CONTRACT AND IS FOR COUNTY USE ONLY



Contract Number

21-433 A-2

SAP Number

4400016803

Department of Behavioral Health

Department Contract Representative	Rebecca Lombard
Telephone Number	909-383-3978
Contractor	Institute for Public Strategies
Contractor Representative	Brenda Simmons
Telephone Number	619-476-9104
Contract Term	July 1, 2021 – December 31, 2025
Original Contract Amount	\$3,025,033
Amendment Amount	\$891,158
Total Contract Amount	\$3,916,191
Cost Center	1010001000

THIS CONTRACT is entered into in the State of California by and between San Bernardino County, hereinafter called the County, and Institute for Public Strategies (IPS) referenced above, hereinafter called Contractor.

IT IS HEREBY AGREED AS FOLLOWS:

WITNESSETH:

IN THAT CERTAIN **Contract No. 21-433** by and between San Bernardino County, a political subdivision of the State of California, and Contractor for Environmental Prevention Strategies and Services (EPSS), which Contract first became effective July 1, 2021, the following changes are hereby made and agreed to, effective January 1, 2024:

- I. ARTICLE IV Funding, paragraph K and L are hereby amended and paragraph M and N are hereby added to read as follows:
 - K. The contract amendment amount of \$891,158 shall increase the total contract amount from \$3,025,033 to \$3,916,191 for the contract term.
 - Fiscal Year 2023-2024 – increase of \$291,039.50 (Includes startup costs of \$91,000)

- Fiscal Year 2024-2025 - increase of \$407,579.00
- Fiscal Year 2025-2026 - increase of \$192,539.50

- L. This amendment hereby revises Schedules A and B for FYs 2023-24, 2024-25 and 2025-26 as set forth in Exhibit I. All previously approved schedules remain in effect.
- M. Contractor will assume responsibility of Environmental Prevention Strategies and Services being relinquished by Mental Health Systems, Inc. To accomplish a rapid start-up of services the following is agreed to:
1. Contractor cannot exceed their current contract maximum amounts prior to approval and execution of the contract amendment by the County.
 2. In order for Contractor to rapidly get these programs operational and fully functional as of January 1, 2024 there is an agreement that Contractor may include up to \$91,000 in addition to the standard invoicing done for the current program operations in the December 2023 through February 2024 invoices, which will be submitted in January through March 2024.
 3. Invoices for March 2024 forward will only include actual costs.
 4. The three invoices that include these start-up costs will be reconciled against actual start-up costs in the March invoice, to be submitted in April 2024.
 5. Total invoices for the implementation and operation of these additional programs through June 30, 2024, shall not exceed the maximum contract amount specified for FY23-24.
- N. The allowable funding sources for this Contract may include: Federal Substance Use Prevention and Treatment Block Grant, and American Rescue Plan Act. Federal funds may not be used as match funds to draw down other federal funds.

II. ARTICLE XVIII Personnel, paragraphs K and L are hereby added to read as follows:

K. Executive Order N-6-22 Russia Sanctions

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" refers to sanctions imposed by the U.S. government in response to Russia's actions in Ukraine (<https://home.treasury.gov/policy-issues/financial-sanctions/sanctions-programs-and-country-information/ukraine-russia-related-sanctions>), as well as any sanctions imposed under state law (<https://www.dgs.ca.gov/OLS/Ukraine-Russia>). The EO directs state agencies and their contractors (including by agreement or receipt of a grant) to terminate contracts with, and to refrain from entering any new contracts with, individuals or entities that are determined to be a target of Economic Sanctions. Accordingly, should it be determined that Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this agreement. Contractor shall be provided advance written notice of such termination, allowing Contractor at least 30 calendar days to provide a written response. Termination shall be at the sole discretion of the County.

L. Campaign Contribution Disclosure (SB 1439)

Contractor has disclosed to the County using Attachment IV - Campaign Contribution Disclosure Senate Bill 1439, whether it has made any campaign contributions of more than \$250 to any member

of the Board of Supervisors or other County elected officer [Sheriff, Assessor-Recorder-Clerk, Auditor-Controller/Treasurer/Tax Collector and the District Attorney] within the earlier of: (1) the date of the submission of Contractor's proposal to the County, or (2) 12 months before the date this Contract was approved by the Board of Supervisors. Contractor acknowledges that under Government Code section 84308, Contractor is prohibited from making campaign contributions of more than \$250 to any member of the Board of Supervisors or other County elected officer for 12 months after the County's consideration of the Contract.

In the event of a proposed amendment to this Contract, the Contractor will provide the County a written statement disclosing any campaign contribution(s) of more than \$250 to any member of the Board of Supervisors or other County elected officer within the preceding 12 months of the date of the proposed amendment.

Campaign contributions include those made by any agent/person/entity on behalf of the Contractor or by a parent, subsidiary or otherwise related business entity of Contractor.

- III. ADDENDUM II AGREEMENT FOR THE PROVISION OF SUBSTANCE USE DISORDER SERVICES ENVIRONMENTAL PREVENTION STRATEGIES AND SERVICES, Paragraph B. Facility Locations and Paragraph D. Program Requirements, Number 3. Program Objective are hereby amended to read as follows:

B. FACILITY LOCATIONS:

Contractor shall provide the above services in and from the following address(es):

San Bernardino Location

242 E. Airport Dr., STE 204
San Bernardino, CA 92408-3450

Victorville Location

15490 Civic Dr., STE 102
Victorville, CA Zip 92392-2382

San Bernardino Location

242 E. Airport Dr., STE 210
San Bernardino, CA 92408-3450

D. Program Requirements

3. Program Objective

Contractor shall advocate, establish, and maintain evidence-based SUD prevention services and shall provide technical assistance to communities to achieve changes in conditions that reduce SUD problems among youth and young adults in San Bernardino County. The prevention services shall be provided in accordance with the County Strategic Prevention Framework and shall implement evidence-based prevention strategies in the regions. Contractor shall provide services as part of an integrated County effort, at community, regional, and county levels, to implement the Prevention Framework and support the SUD prevention priority areas described below and referred to as SUD Prevention Priority Areas.

- a. Alcohol Prevention
- b. Marijuana Prevention
- c. Methamphetamine Prevention

d. Opioid Prevention

Contractor shall provide countywide technical assistance to the communities, cities, and stakeholders as approved by DBH.

Region(s)	Additional Services
<ul style="list-style-type: none">• East Valley• High Desert• Central Valley	<p>Co-facilitation/coordination of DBH-approved Media and Applied Data and Research Workgroups.</p> <p>Note: Co-facilitation/coordination will be based on direction and approval by DBH.</p>

IV. This amendment hereby adds Attachment IV Campaign Contribution Disclosure Form (SB 1439).

V. This amendment hereby adds Exhibit I Schedules A and B for FYs 2023-24, 2024-25 and 2025-26.

VI. All other terms, conditions and covenants in the basic agreement remain in full force and effect.

This Agreement may be executed in any number of counterparts, each of which so executed shall be deemed to be an original, and such counterparts shall together constitute one and the same Agreement. The parties shall be entitled to sign and transmit an electronic signature of this Agreement (whether by facsimile, PDF or other email transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Agreement upon request.

SAN BERNARDINO COUNTY

Dawn Rowe, Chair, Board of Supervisors

Dated: _____
SIGNED AND CERTIFIED THAT A COPY OF THIS
DOCUMENT HAS BEEN DELIVERED TO THE
CHAIRMAN OF THE BOARD

Lynna Monell
Clerk of the Board of Supervisors
of San Bernardino County

By _____
Deputy

Institute for Public Strategies

(Print or type name of corporation, company, contractor, etc.)

By ► _____
(Authorized signature - sign in blue ink)

Name _____
(Print or type name of person signing contract)

Title _____
(Print or Type)

Dated: _____

Address 8885 Rio San Diego Drive, Ste 117

San Diego, CA 92108

FOR COUNTY USE ONLY

Approved as to Legal Form	Reviewed for Contract Compliance	Reviewed/Approved by Department
► _____ Dawn Martin, Deputy County Counsel	► _____ Ellayna Hoatson, Contracts Supervisor	► _____ Georgina Yoshioka, Director
Date _____	Date _____	Date _____

EXHIBIT I

SCHEDULE A

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
SCHEDULE A

BUDGET PERIOD: 1/1/24 - 6/30/24

Contractor Name: Institute for Public Strategies

Contractor Address: 8885 Rio San Diego Dr. #117

San Diego, CA 92108

Prepared by: Michael Geiger

Title: Controller

Date Completed: 3/7/2024

FUNDING SOURCE	Primary Prevention	CRRSAA	ARPA	TOTAL
Budget	\$ 185,039.50	\$ -	\$ 15,000.00	\$ 200,039.50
Service Hours	2,661	0	216	2,877
CPU	\$ 69.53	\$ 69.53	\$ 69.53	\$ 69.53

APPROVALS:

Signature: Brenda Simmons Mar 26, 2024 Anthony Altamirano Mar 20, 2024 Gustavo Cisneros Mar 20, 2024
Brenda Simmons (Mar 26, 2024 12:03 PDT) Anthony Altamirano (Mar 20, 2024 12:44 PDT) Gustavo Cisneros (Mar 20, 2024 12:24 PDT)
PROVIDER AUTHORIZED Date DBH FISCAL SERVICES Date DBH PROGRAM MANAGER or DESIGNEE Date

Printed Name: Brenda Simmons Anthony Altamirano Gustavo Cisneros
PROVIDER AUTHORIZED DBH FISCAL SERVICES DBH PROGRAM MANAGER or DESIGNEE

CFDA title and number	Award Name	Federal Agency	Pass-through Agency
SAPT Block Grant 93.959	Discretionary	SAMHSA	DHCS

EXHIBIT I

SCHEDULE A

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
SCHEDULE A

BUDGET PERIOD: 7/1/24 - 6/30/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

FUNDING SOURCE	Primary Prevention	CRRSAA	ARPA	TOTAL
Budget	\$ 362,579.00	\$ -	\$ 45,000.00	\$ 407,579.00
Service Hours	5,116	0	635	5,751
CPU	\$ 70.87	\$ 70.87	\$ 70.87	\$ 70.87

APPROVALS:

Signature: *Brenda Simmons* Mar 26, 2024 *Anthony Altamirano* Mar 20, 2024 *Gustavo Cisneros* Mar 20, 2024
PROVIDER AUTHORIZED Date DBH FISCAL SERVICES Date DBH PROGRAM MANAGER or DESIGNEE Date
 Printed Name: Brenda Simmons Anthony Altamirano Gustavo Cisneros
PROVIDER AUTHORIZED DBH FISCAL SERVICES DBH PROGRAM MANAGER or DESIGNEE

CFDA title and number	Award Name	Federal Agency	Pass-through Agency
SAPT Block Grant 93.959	Discretionary	SAMHSA	DHCS

EXHIBIT I

SCHEDULE A

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
SCHEDULE A

BUDGET PERIOD: 7/1/25 - 12/31/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

FUNDING SOURCE	Primary Prevention	CRRSAA	ARPA	TOTAL
Budget	\$ 192,539.50	\$ -		\$ 192,539.50
Service Hours	2,832	0	0	2,832
CPU	\$ 67.99	\$ 67.99	\$ 67.99	\$ 67.99

APPROVALS:

Signature: Brenda Simmons Mar 26, 2024 Anthony Altamirano Mar 20, 2024 Gustavo Cisneros Mar 20, 2024
PROVIDER AUTHORIZED Date DBH FISCAL SERVICES Date DBH PROGRAM MANAGER or DESIGNEE Date
Printed Name: Brenda Simmons Anthony Altamirano Gustavo Cisneros
PROVIDER AUTHORIZED DBH FISCAL SERVICES DBH PROGRAM MANAGER or DESIGNEE

CFDA title and number	Award Name	Federal Agency	Pass-through Agency
SAPT Block Grant 93.959	Discretionary	SAMHSA	DHCS

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION

PROGRAM BUDGET - PERSONNEL SALARY & BENEFIT DETAIL

BUDGET PERIOD: 1/1/24 - 6/30/24

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/7/2024

1	2	3	4	5	6	7	8	9
POSITION TITLE	HOURLY RATE	TOTAL PAID HOURS	TOTAL SALARY COST	EMPLOYEE BENEFIT COST	TOTAL PERSONNEL COST	NON-SUDRS HOURS	SUDRS CONTRACT HOURS	SUDRS PERSONNEL COST
Community Organizer	\$ 21.63	1,040	\$ 22,495.20	\$ 6,748.56	\$ 29,243.76	0	1,040	\$ 29,243.76
Program Manager	\$ 28.85	1,040	\$ 30,004.00	\$ 9,001.20	\$ 39,005.20	0	1,040	\$ 39,005.20
Prevention Specialist	\$ 21.63	1,040	\$ 22,495.20	\$ 6,748.56	\$ 29,243.76	0	1,040	\$ 29,243.76
Media Specialist	\$ 39.99	104	\$ 4,158.96	\$ 1,247.69	\$ 5,406.65	0	104	\$ 5,406.65
			\$ -		\$ -		-	\$ -
Regional Director	\$ 32.00	520	\$ 16,640.00	\$ 1,649.85	\$ 18,289.85	0	520	\$ 18,289.85
VP of Programs	\$ 52.88	104	\$ 5,499.52	\$ 4,992.00	\$ 10,491.52	0	104	\$ 10,491.52
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			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
TOTALS		3848	\$ 101,292.88	\$ 30,387.86	\$ 131,680.74	0	3,848	\$131,680.74

SCHEDULE B

BUDGET PERIOD: 1/1/24 - 6/30/24

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/7/2024

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SCHEDULE B

BUDGET PERIOD: 1/1/24 - 6/30/24

Prepared by:	<u>Michael Geiger</u>
Title:	<u>Controller</u>
Date Completed:	<u>3/7/2024</u>

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EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
PROGRAM BUDGET - BUDGET NARRATIVE

BUDGET PERIOD: 1/1/24 - 6/30/24

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/7/2024

1	2	3	4
EXPENDITURE	SUDRS COSTS	NON-SUDRS COSTS	DESCRIPTION OF EXPENDITURE
Communications	\$ 3,426.00	\$ -	Telecommunications costs are inclusive of all telecommunications expense for the project: office telephone, internet access, cloud data storage, remote PC access, virtual meeting service fees (Zoom, Webex), and staff cell phone reimbursement. The cost of internet services is shared with other projects in the same office location and prorated for each project based on the percentage of staff hours charged to the project. Company-wide shared expenses (telephone, cloud data storage, remote PC access) are pooled and charged to each project on a monthly basis, prorated by the percentage of staff hours charged to the project. Virtual meeting services fees (Zoom, Webex) are charged to each project on the basis of monthly usage by project. IPS' cell phone policy allows for all staff to be reimbursed monthly for the project usage of their personal cell phones.
Insurance	\$ 822.00	\$ -	IPS carries liability insurance through the Nonprofits Insurance Alliance. Per contractual requirements, IPS' insurance coverage includes commercial liability, automobile liability for all owned, non-owned, and hired vehicles, professional liability, improper sexual conduct, and cyber liability insurance. IPS also carries an accident policy for additional coverage for volunteers and youth and business property insurance. IPS carries an umbrella policy, which increases our coverage by \$2,000,000 per occurrence and \$2,000,000 in aggregate. IPS carries Worker's Compensation through Zurich American Insurance Company; workers' compensation insurance is charged as an employee benefit. The insurance cost is shared by all programs, prorated by FTE and office space square footage.
Supplies	\$ 1,028.00	\$ -	Costs for supplies, computer accessories and supplies, printer cartridges, and other disposable supplies such as copy paper, pens, post-it notes, postage/stamps, and other general supplies are identified and charged directly to each project. For staff who work on this project but their primary office is located in a separate location, a portion of their supplies costs is allocated to this project on the basis of worked hours in each project.
Equipment	\$ 1,157.00	\$ -	This line item includes the cost for purchasing and/or replacing computers, small office equipment, furniture and other miscellaneous equipment for project staff. In order to maintain appropriate inventory logs, the full cost of any minor equipment with a value of \$100 or greater is charged entirely to one project regardless of whether the staff member works in multiple projects. The monthly expense for the lease agreement for the photocopier is included in this line item and is allocated to each project based on actual copier usage. Any other equipment rental for meetings would be charged to this line item. Some equipment may be paid for with ARPA funds.
Rent & Lease	\$ 9,785.00	\$ -	IPS leases office space in the Central Valley area specifically for this project. The monthly rent expense is \$1,630.90. The cost of this space is considered a direct expense and is charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the rent assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.
Mileage & Travel	\$ 6,000.00	\$ -	Staff are reimbursed for mileage at a reasonable rate, currently \$.655 per mile. Travel expenses for staff to attend conferences and educational seminars including airfare, hotels, taxis/car rental, and per diem at the current federal rate are included if necessary. Travel expenses, other than local mileage, will be paid for with ARPA funds.
Staff Training/Conferences	\$ 3,087.00	\$ -	This line item includes amounts for professional development activities such as attending SUD conferences, educational materials and webinars that require a fee, management coaching, supervisor training, and coaching, and team-building expenses along with CPR recertifications and other contract-specific required training expenses. Staff training and conferences will be paid for with ARPA funds.
Utilities	\$ 1,507.00	\$ -	The cost of the ADT burglar alarm system and utilities provided by Southern California Edison are considered a direct expense and are charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the utilities expense assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.

SCHEDULE B

This form should be used to justify an unusual expenditure, to identify in detail a line-item described as "other", or for a budget that has an expenditure of 10% or more of the proposed contract amount.

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION

PROGRAM BUDGET - PERSONNEL SALARY & BENEFIT DETAIL

BUDGET PERIOD: 7/1/24 - 6/30/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

1	2	3	4	5	6	7	8	9
POSITION TITLE	HOURLY RATE	TOTAL PAID HOURS	TOTAL SALARY COST	EMPLOYEE BENEFIT COST	TOTAL PERSONNEL COST	NON-SUDRS HOURS	SUDRS CONTRACT HOURS	SUDRS PERSONNEL COST
VP of Programs	\$ 52.88	208	\$ 10,999.04	\$ 3,299.71	\$ 14,298.75	0	208	\$ 14,298.75
Regional Director	\$ 32.00	1,040	\$ 33,280.00	\$ 9,984.00	\$ 43,264.00	0	1,040	\$ 43,264.00
Program Manager	\$ 28.85	2,080	\$ 60,008.00	\$ 18,002.40	\$ 78,010.40	0	2,080	\$ 78,010.40
Prevention Specialist	\$ 21.63	2,080	\$ 44,990.40	\$ 13,497.12	\$ 58,487.52	0	2,080	\$ 58,487.52
			\$ -		\$ -		-	\$ -
Community Organizer	\$ 21.63	2,080	\$ 44,990.40	\$ 13,497.12	\$ 58,487.52	0	2,080	\$ 58,487.52
Media Specialist	\$ 39.90	208	\$ 8,299.20	\$ 2,489.76	\$ 10,788.96	0	208	\$ 10,788.96
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
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TOTALS		7696	\$ 202,567.04	\$ 60,770.11	\$ 263,337.15	0	7,696	\$263,337.15

SCHEDULE B

BUDGET PERIOD: 7/1/24 - 6/30/25

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

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SCHEDULE B

BUDGET PERIOD: 7/1/24 - 6/30/25

Prepared by:	<u>Michael Geiger</u>
Title:	<u>Controller</u>
Date Completed:	<u>3/8/2024</u>

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EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
 Substance Use Disorder and Recovery Services
 PRIMARY PREVENTION
 PROGRAM BUDGET - BUDGET NARRATIVE

BUDGET PERIOD: 7/1/24 - 6/30/25

Contractor Name: Institute for Public Strategies
 Contractor Address: 8885 Rio San Diego Dr. #117
 San Diego, CA 92108

Prepared by: Michael Geiger
 Title: Controller
 Date Completed: 3/8/2024

1	2	3	4
EXPENDITURE	SUDRS COSTS	NON-SUDRS COSTS	DESCRIPTION OF EXPENDITURE
Communications	\$ 6,852.00	\$ -	Telecommunications costs are inclusive of all telecommunications expense for the project: office telephone, internet access, cloud data storage, remote PC access, virtual meeting service fees (Zoom, Webex), and staff cell phone reimbursement. The cost of internet services is shared with other projects in the same office location and prorated for each project based on the percentage of staff hours charged to the project. Company-wide shared expenses (telephone, cloud data storage, remote PC access) are pooled and charged to each project on a monthly basis, prorated by the percentage of staff hours charged to the project. Virtual meeting services fees (Zoom, Webex) are charged to each project on the basis of monthly usage by project. IPS' cell phone policy allows for all staff to be reimbursed monthly for the project usage of their personal cell phones.
Insurance	\$ 1,644.00	\$ -	IPS carries liability insurance through the Nonprofits Insurance Alliance. Per contractual requirements, IPS' insurance coverage includes commercial liability, automobile liability for all owned, non-owned, and hired vehicles, professional liability, improper sexual conduct, and cyber liability insurance. IPS also carries an accident policy for additional coverage for volunteers and youth and business property insurance. IPS carries an umbrella policy, which increases our coverage by \$2,000,000 per occurrence and \$2,000,000 in aggregate. IPS carries Worker's Compensation through Zurich American Insurance Company; workers' compensation insurance is charged as an employee benefit. The insurance cost is shared by all programs, prorated by FTE and office space square footage.
Supplies	\$ 2,056.00	\$ -	Costs for supplies, computer accessories and supplies, printer cartridges, and other disposable supplies such as copy paper, pens, post-it notes, postage/stamps, and other general supplies are identified and charged directly to each project. For staff who work on this project but their primary office is located in a separate location, a portion of their supplies costs is allocated to this project on the basis of worked hours in each project.
Equipment	\$ 2,315.00	\$ -	This line item includes the cost for purchasing and/or replacing computers, small office equipment, furniture and other miscellaneous equipment for project staff. In order to maintain appropriate inventory logs, the full cost of any minor equipment with a value of \$100 or greater is charged entirely to one project regardless of whether the staff member works in multiple projects. The monthly expense for the lease agreement for the photocopier is included in this line item and is allocated to each project based on actual copier usage. Any other equipment rental for meetings would be charged to this line item. Some equipment may be paid for with ARPA funds.
Rent & Lease	\$ 19,571.00	\$ -	IPS leases office space in the Central Valley area specifically for this project. The monthly rent expense is \$1,630.90. The cost of this space is considered a direct expense and is charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the rent assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.
Mileage & Travel	\$ 12,000.00	\$ -	Staff are reimbursed for mileage at a reasonable rate, currently \$.655 per mile. Travel expenses for staff to attend conferences and educational seminars including airfare, hotels, taxi/car rental, and per diem at the current federal rate are included if necessary. Travel expenses, other than local mileage, will be paid for with ARPA funds.
Staff Training/Conferences	\$ 7,431.00	\$ -	This line item includes amounts for professional development activities such as attending SUD conferences, educational materials and webinars that require a fee, management coaching, supervisor training, and coaching, and team-building expenses along with CPR recertifications and other contract-specific required training expenses. Staff Training and Conferences will be paid for with ARPA funds.
Utilities	\$ 3,015.00	\$ -	The cost of the ADT burglar alarm system and utilities provided by Southern California Edison are considered a direct expense and are charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the utilities expense assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.

EXHIBIT I

SCHEDULE B

			Costs for program permit fees and business licenses are identified and charged directly and included under Licenses and Fees. The cost of open job postings and pre-employment activities such as drug testing and livenesscan are included in this line item. IPS uses Paylocity as a payroll service provider. Paylocity costs associated with the bi-monthly payroll and year end payroll documentation are charged on a company-wide basis allocated to each project on the basis of total salaries expense.
License & Fees	\$ 1,644.00	\$ -	
Printing and Duplicating	\$ 1,370.00	\$ -	Printing and duplication includes the cost of printing of flyers, brochures, issue briefings, banners, meeting materials, signage, etc. Printing and duplication will be paid for with ARPA funds.
Meeting Expenses	\$ 1,370.00	\$ -	Direct costs for meeting expenses are included in this line item. They include venue and room rental fees for small and large-scale events, planning meetings, coalition meetings, youth meetings, etc. Translation services is also included in this line item. Meeting Expenses will be paid for with ARPA funds.
Dues & Subscriptions	\$ 1,370.00	\$ -	This item includes professional association and other membership dues the cost is considered direct to that project. Subscriptions to Canva, Bitable, Constant Contact, Survey Monkey, and other online services may be included in this line item. Local newspaper subscriptions and other online subscription costs are considered direct to that project are charged in this line item. Dues and Subscriptions will be paid for with ARPA funds.
	\$ -	\$ -	
Incentives	\$ 6,852.00	\$ -	Incentives include non-monetary rewards for youth coalition members, community members conducting assessments or collecting surveys, and community members completing surveys. Examples include Target Gift Cards, tumblers printed with a coalition or event logo, and fidget toys. Incentives will be paid for with ARPA funds.
Indirect Costs Applied	\$ 76,752.00	\$ -	Indirect costs include all costs that exist in the organization independent of program expenses. Administrative staff wholly identified as indirect expense includes the Chief Financial Officer, VP/Administration and Development, Staff Accountant, and any grant writing staff. Portions of other staff whose work cannot be attributed exclusively to a program are also included in indirect expenses. The expenses associated with these staff are included in indirect expenses as well. IPS carries Directors and Officers Insurance, an ERISA bond, and Fidelity coverage, the cost of which is included in our indirect rate. IPS' Indirect Cost Rate Allocation Base is Total Direct Costs, with subcontracts over \$25,000 excluded from the allocation base. Our Federally Negotiated Indirect Cost rate is 23.20%. A portion of indirect charges will be paid with ARPA funds.
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	

This form should be used to justify an unusual expenditure, to identify in detail a line-item described as "other", or for a budget that has an expenditure of 10% or more of the proposed contract amount.

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION

PROGRAM BUDGET - PERSONNEL SALARY & BENEFIT DETAIL

BUDGET PERIOD: 7/1/25 - 12/31/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

1	2	3	4	5	6	7	8	9
POSITION TITLE	HOURLY RATE	TOTAL PAID HOURS	TOTAL SALARY COST	EMPLOYEE BENEFIT COST	TOTAL PERSONNEL COST	NON-SUDRS HOURS	SUDRS CONTRACT HOURS	SUDRS PERSONNEL COST
VP of Programs	\$ 52.88	30	\$ 1,586.40	\$ 475.92	\$ 2,062.32	0	30	\$ 2,062.32
Regional Director	\$ 32.00	520	\$ 16,640.00	\$ 4,992.00	\$ 21,632.00	0	520	\$ 21,632.00
Program Manager	\$ 28.85	1,040	\$ 30,004.00	\$ 9,001.20	\$ 39,005.20	0	1,040	\$ 39,005.20
Prevention Specialist	\$ 21.63	1,040	\$ 22,495.20	\$ 6,748.56	\$ 29,243.76	0	1,040	\$ 29,243.76
			\$ -		\$ -		-	\$ -
Community Organizer	\$ 21.63	1,040	\$ 22,495.20	\$ 6,748.56	\$ 29,243.76	0	1,040	\$ 29,243.76
Media Specialist	\$ 39.90	104	\$ 4,149.60	\$ 1,244.88	\$ 5,394.48	0	104	\$ 5,394.48
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
			\$ -		\$ -		-	\$ -
TOTALS		3774	\$ 97,370.40	\$ 29,211.12	\$ 126,581.52	0	3,774	\$126,581.52

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
PROGRAM BUDGET - ANALYSIS OF AVAILABLE HOURS

BUDGET PERIOD: 7/1/25 - 12/31/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

1	2	3	4	5	6	7	8
STAFF POSITION	TOTAL HOURS CHARGED to SUDRS	NO. OF FTEs (Column #2/2080)	PAID NON- WORKED HOURS (Vacation, Holiday, Sick)	HOURS WORKED SUDRS	NON-SERVICE HOURS (Administration, Staff Meetings, Training, No Show, etc.)	SERVICE HOURS (Prevention)	SERVICE HOURS AS A PERCENT OF WORKED HOURS
VP of Programs	30	0.01	3	27	9	18	67%
Regional Director	520	0.25	52	468	130	338	72%
Program Manager	1,040	0.50	104	936	208	728	78%
Prevention Specialist	1,040	0.50	104	936	104	832	89%
	-	0.00		0		0	0%
Community Organizer	1,040	0.50	104	936	104	832	89%
Media Specialist	104	0.05	10	94	10	84	89%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
	-	0.00		0		0	0%
TOTALS	3,774	1.81	377	3,397	565.00	2,832	83%

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
PROGRAM BUDGET - LINE ITEM COST DETAIL

BUDGET PERIOD: 7/1/25 - 12/31/25

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/8/2024

1	2	3	4
EXPENDITURE	SUDRS COSTS	NON-SUDRS COSTS	TOTAL COST
TOTAL SALARIES & BENEFITS	\$ 126,582	\$ -	\$ 126,582
SERVICES AND SUPPLIES			
Communications	\$ 3,428		\$ 3,428
Insurance	\$ 822		\$ 822
Supplies	\$ 1,028		\$ 1,028
Rent & Lease	\$ 9,785		\$ 9,785
Equipment	\$ 1,157		\$ 1,157
Mileage & Travel	\$ 6,000		\$ 6,000
Staff Training/Conferences	\$ 2,654		\$ 2,654
Utilities	\$ 1,507		\$ 1,507
Licenses & Fees	\$ 822		\$ 822
Printing and Duplicating	\$ 500		\$ 500
Meeting Expenses	\$ 500		\$ 500
Dues & Subscriptions	\$ 500		\$ 500
			\$ -
Incentives	\$ 1,000		\$ 1,000
Indirect Costs	\$ 36,257		\$ 36,257
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
TOTAL SERVICES & SUPPLIES	\$ 65,958	\$ -	\$ 65,958
TOTAL EXPENDITURES	\$ 192,540	\$ -	\$ 192,540
REVENUE			
OTHER:			\$ -
OTHER:			\$ -
TOTAL REVENUE	\$ -	\$ -	\$ -
NET CONTRACT AMOUNT	\$ 192,540	\$ -	\$ 192,540

SUMMARY: COST per HOUR			
NET COST	\$ 192,540		
SERVICE HOURS	2832	From "Analysis of Available Hours": column 7, Total)	
NET COST PER HOUR	\$ 68	Net Cost divided by Services Hours = Net Cost per Hour	

EXHIBIT I

SCHEDULE B

San Bernardino County Department of Behavioral Health
Substance Use Disorder and Recovery Services
PRIMARY PREVENTION
PROGRAM BUDGET - BUDGET NARRATIVE

BUDGET PERIOD: 7/1/26 - 12/31/26

Contractor Name: Institute for Public Strategies
Contractor Address: 8885 Rio San Diego Dr. #117
San Diego, CA 92108

Prepared by: Michael Geiger
Title: Controller
Date Completed: 3/9/2024

1	2	3	4
EXPENDITURE	BUDGET COSTS	NON-BUDGET COSTS	DESCRIPTION OF EXPENDITURE
Communications	\$ 3,426.00	\$ -	Telecommunications costs are inclusive of all telecommunications expense for the project: office telephone, internet access, cloud data storage, remote PC access, virtual meeting service fees (Zoom, Webex), and staff cell phone reimbursement. The cost of internet services is shared with other projects in the same office location and prorated for each project based on the percentage of staff hours charged to the project. Company-wide shared expenses (telephone, cloud data storage, remote PC access) are pooled and charged to each project on a monthly basis, prorated by the percentage of staff hours charged to the project. Virtual meeting services fees (Zoom, Webex) are charged to each project on the basis of monthly usage by project. IPS' cell phone policy allows for all staff to be reimbursed monthly for the project usage of their personal cell phones.
Insurance	\$ 822.00	\$ -	IPS carries liability insurance through the Nonprofits Insurance Alliance. Per contractual requirements, IPS' insurance coverage includes commercial liability, automobile liability for all owned, non-owned, and hired vehicles, professional liability, improper sexual conduct, and cyber liability insurance. IPS also carries an accident policy for additional coverage for volunteers and youth and business property insurance. IPS carries an umbrella policy, which increases our coverage by \$2,000,000 per occurrence and \$2,000,000 in aggregate. IPS carries Worker's Compensation through Zurich American Insurance Company; workers' compensation insurance is charged as an employee benefit. The insurance cost is shared by all programs, prorated by FTE and office space square footage.
Supplies	\$ 1,028.00	\$ -	Costs for supplies, computer accessories and supplies, printer cartridges, and other disposable supplies such as copy paper, pens, post-it notes, postage/stamps, and other general supplies are identified and charged directly to each project. For staff who work on this project but their primary office is located in a separate location, a portion of their supplies costs is allocated to this project on the basis of worked hours in each project.
Rent & Lease	\$ 9,785.00	\$ -	IPS leases office space in the Central Valley area specifically for this project. The monthly rent expense is \$1,630.90. The cost of this space is considered a direct expense and is charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the rent assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.
Equipment	\$ 1,157.00	\$ -	This line item includes the cost for purchasing and/or replacing computers, small office equipment, furniture and other miscellaneous equipment for project staff. In order to maintain appropriate inventory logs, the full cost of any minor equipment with a value of \$100 or greater is charged entirely to one project regardless of whether the staff member works in multiple projects. The monthly expense for the lease agreement for the photocopier is included in this line item and is allocated to each project based on actual copier usage. Any other equipment rental for meetings would be charged to this line item.
Mileage & Travel	\$ 6,000.00	\$ -	Staff are reimbursed for mileage at a reasonable rate, currently \$.655 per mile. Travel expenses for staff to attend conferences and educational seminars including airfare, hotels, taxis/car rental, and per diem at the current federal rate are included if necessary.
Staff Training/Conferences	\$ 2,654.00	\$ -	This line item includes amounts for professional development activities such as attending SUD conferences, educational materials and webinars that require a fee, management coaching, supervisor training, and coaching, and team-building expenses along with CPR recertifications and other contract-specific required training expenses.
Utilities	\$ 1,507.00	\$ -	The cost of the ADT burglar alarm system and utilities provided by Southern California Edison are considered a direct expense and are charged exclusively to this project. For staff who work on this project but their primary office is located in a separate location, a portion of the utilities expense assigned to their respective office is allocated to this project on the basis of the square footage of their offices and the percentage of time allocated to the project.

EXHIBIT I

SCHEDULE B

			Costs for program permit fees and business licenses are identified and charged directly and included under Licenses and Fees. The cost of open job postings and pre-employment activities such as drug testing and live scan are included in this line item. IPS uses Paylocity as a payroll service provider. Paylocity costs associated with the bi-monthly payroll and year end payroll documentation are charged on a company-wide basis allocated to each project on the basis of total salaries expense.
Licenses & Fees	\$ 822.00	\$ -	
Printing and Duplicating	\$ 500.00	\$ -	Printing and duplication includes the cost of printing of flyers, brochures, issue briefings, banners, meeting materials, signage, etc.
Meeting Expenses	\$ 500.00	\$ -	Direct costs for meeting expenses are included in this line item. They include venue and room rental fees for small and large-scale events, planning meetings, coalition meetings, youth meetings, etc. Translation services is also included in this line item.
Dues & Subscriptions	\$ 500.00	\$ -	This item includes professional association and other membership dues the cost is considered direct to that project. Subscriptions to Canva, Bitable, Constant Contact, Survey Monkey, and other online services may be included in this line item. Local newspaper subscriptions and other online subscription costs are considered direct to that project are charged in this line item.
	\$ -	\$ -	
Incentives	\$ 1,000.00	\$ -	Incentives include non-monetary rewards for youth coalition members, community members conducting assessments or collecting surveys, and community members completing surveys. Examples include Target Gift Cards, tumblers printed with a coalition or event logo, and fidget toys.
Indirect Costs	\$ 36,257.00	\$ -	Indirect costs include all costs that exist in the organization independent of program expenses. Administrative staff wholly identified as indirect expense includes the Chief Financial Officer, VPI/Administration and Development, Staff Accountant, and any grant writing staff. Portions of other staff whose work cannot be attributed exclusively to a program are also included in indirect expenses. The expenses associated with these staff are included in indirect expenses as well. IPS carries Directors and Officers Insurance, an ERISA bond, and Fidelity coverage, the cost of which is included in our Indirect rate. IPS' Indirect Cost Rate Allocation Base is Total Direct Costs, with subcontracts over \$25,000 excluded from the allocation base. Our Federally Negotiated Indirect Cost rate is 23.20%.
	\$ -	\$ -	
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	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	

This form should be used to justify an unusual expenditure, to identify in detail a line-item described as "other", or for a budget that has an expenditure of 10% or more of the proposed contract amount.



Campaign Contribution Disclosure (SB 1439)

DEFINITIONS

Actively supporting the matter: (a) Communicate directly with a member of the Board of Supervisors or other County elected officer [Sheriff, Assessor-Recorder-Clerk, District Attorney, Auditor-Controller/Treasurer/Tax Collector] for the purpose of influencing the decision on the matter; or (b) testifies or makes an oral statement before the County in a proceeding on the matter for the purpose of influencing the County's decision on the matter; or (c) communicates with County employees, for the purpose of influencing the County's decision on the matter; or (d) when the person/company's agent lobbies in person, testifies in person or otherwise communicates with the Board or County employees for purposes of influencing the County's decision in a matter.

Agent: A third-party individual or firm who, for compensation, is representing a party or a participant in the matter submitted to the Board of Supervisors. If an agent is an employee or member of a third-party law, architectural, engineering or consulting firm, or a similar entity, both the entity and the individual are considered agents.

Otherwise related entity: An otherwise related entity is any for-profit organization/company which does not have a parent-subsidary relationship but meets one of the following criteria:

- (1) One business entity has a controlling ownership interest in the other business entity;
- (2) there is shared management and control between the entities; or
- (3) a controlling owner (50% or greater interest as a shareholder or as a general partner) in one entity also is a controlling owner in the other entity.

For purposes of (2), "shared management and control" can be found when the same person or substantially the same persons own and manage the two entities; there are common or commingled funds or assets; the business entities share the use of the same offices or employees, or otherwise share activities, resources or personnel on a regular basis; or there is otherwise a regular and close working relationship between the entities.

Parent-Subsidiary Relationship: A parent-subsidiary relationship exists when one corporation has more than 50 percent of the voting power of another corporation.

Contractors must respond to the questions on the following page. If a question does not apply respond N/A or Not Applicable.

1. Name of Contractor: Institute for Public Strategies
2. Is the entity listed in Question No.1 a nonprofit organization under Internal Revenue Code section 501(c)(3)?
 Yes ☒ If yes, skip Question Nos. 3-4 and go to Question No. 5 No ☐
3. Name of Principal (i.e., CEO/President) of entity listed in Question No. 1, if the individual actively supports the matter and has a financial interest in the decision: _____
4. If the entity identified in Question No.1 is a corporation held by 35 or less shareholders, and not publicly traded ("closed corporation"), identify the major shareholder(s):

5. Name of any parent, subsidiary, or otherwise related entity for the entity listed in Question No. 1 (see definitions above):

Company Name	Relationship
N/A	

6. Name of agent(s) of Contractor:

Company Name	Agent(s)	Date Agent Retained (if less than 12 months prior)
N/A		

7. Name of Subcontractor(s) (including Principal and Agent(s)) that will be providing services/work under the awarded contract if the subcontractor (1) actively supports the matter and (2) has a financial interest in the decision and (3) will be possibly identified in the contract with the County or board governed special district.

Company Name	Subcontractor(s):	Principal and/or Agent(s):
N/A		

8. Name of any known individuals/companies who are not listed in Questions 1-7, but who may (1) actively support or oppose the matter submitted to the Board and (2) have a financial interest in the outcome of the decision:

Company Name	Individual(s) Name
N/A	

9. Was a campaign contribution, of more than \$250, made to any member of the San Bernardino County Board of Supervisors or other County elected officer within the prior 12 months, by any of the individuals or entities listed in Question Nos. 1-8?

No ☒ If **no**, please skip Question No. 10.

Yes ☐ If **yes**, please continue to complete this form.

10. Name of Board of Supervisor Member or other County elected officer: _____

Name of Contributor: _____

Date(s) of Contribution(s): _____

Amount(s): _____

Please add an additional sheet(s) to identify additional Board Members or other County elected officers to whom anyone listed made campaign contributions.

By signing the Contract, Contractor certifies that the statements made herein are true and correct. Contractor understands that the individuals and entities listed in Question Nos. 1-8 are prohibited from making campaign contributions of more than \$250 to any member of the Board of Supervisors or other County elected officer while award of this Contract is being considered and for 12 months after a final decision by the County.