

Schedule A-1
Scope of Services
Snohomish County Law Enforcement Assisted Diversion (LEAD)
and Recovery Navigator Programs

Contractor shall provide case management, supervision, and other responsibilities as defined below.

The LEAD case management supervisor shall be trained professional with experience serving persons with substance use and mental health disorders, identified by Evergreen Recovery Centers in collaboration with the LEAD Program Director. The LEAD Case Management Supervisor will report to and receive guidance from the Director of Outreach Programs at Evergreen Recovery Centers who shall be a credentialed professional.

A. Program Services

Evergreen Recovery will assume a primary leadership role for the Case Management (CM) services of the LEAD and Recovery Navigator Programs in collaboration with the LEAD Snohomish County Program Director. The following positions shall be hired by Evergreen:

Staff	#	Caseload
Director of Outreach Programs	.10	0
Case Management Supervisor	1	0 (or more as needed)
Senior Staff	1	0
Senior Case Manager	1	Up to 25
Outreach Specialists	2	Up to 25 each
Case Managers (CM)	7	25 each

Contractor shall:

1. Operate the Law Enforcement Assisted Diversion (LEAD) Program in compliance with LEAD guidelines as established by LEAD -Support Bureau (SB) and in coordination with the agencies defined in the RFP and expand LEAD program to also operate Recovery Navigator Program (RNP) in compliance with HCA’s Recovery Navigator Program Standards.
2. Hire and maintain staff capacity to operate the LEAD and RNP activities, providing supervisory and general administrative support to the LEAD CM team;

ensure appropriate staff training and supervision related to the complex challenges of LEAD participants.

3. Work with as many as 275 LEAD participants with the flexibility of expanding the program if needs and resources are available. If client numbers appear unlikely to reach 275, Contractor will assist Program Director in additional referral recruiting efforts.
4. Assist in the development and regular updates to policies and procedures, in collaboration with the LEAD Program Director and Operational Work Group, that will inform and guide the LEAD program activities and expectations.

Structure for policies and procedures are provided by LEAD SB but are written by the Program Director specifically for Snohomish County LEAD. They will include guidance on participant eligibility, referrals, types of services provided, Individual Success Plans, expectations of partner agencies and data to be collected.

5. Work directly with city and county Prosecuting Attorney's offices to determine the status of an individual as a LEAD participant.
6. Participate in twice monthly Operational Work Group meetings consisting of Program Director, Recovery Navigators, case managers, LEAD-assigned officers and sergeants, city/police social workers, LEAD-assigned jail staff, LEAD assigned city prosecutors and public defenders. Meetings will occur in person at a central location whenever possible or through Zoom and will be scheduled by the LEAD Program Director.
7. Work closely with LEAD Program Director to submit and analyze metrics for LEAD program outcome measures and employ a continuous quality improvement process.
8. Facilitate and provide engagement, care coordination and case management services to LEAD participants including:
 - a. Work closely with law enforcement agencies to coordinate outreach activities to LEAD participants, responding during set on call hours to include teaming with these agencies during participant contacts to encourage participation in the LEAD program; maintain engagement and care coordination efforts despite their reticence for help, to the extent appropriate. Staggered shifts will provide staffing from at least 7AM to 9PM, seven (7) days per week for the LEAD program. These hours are dependent upon the number of clients and the needs of the program and may be changed as is agreeable to both parties. The LEAD phone hotline must be in working order and answered during these hours. 24/7 coverage should also be available through a mutually agreed upon method by 2025.
 - b. Respond to "social contact" referrals the following business day by using information contained in referrals to locate the participant and offer LEAD case management services.
 - c. Monitor caseloads to ensure delivery of adequate care coordination services and make or recommend adjustments as appropriate.

- d. Work with human services agencies to create new and/or innovative strategies where existing processes or policies are inflexible or ineffective to meet the needs of the LEAD participants.
 - e. Provide services out of office and on-site whenever possible to best achieve the goals of the participants' Individual Success Plans.
 - f. Provide transportation via automobile for LEAD participants for necessary appointments, as appropriate.
9. Develop and provide oversight of Individual Success Plans for participants in the LEAD Program including:
 - a. Screen and assess or arrange for intake assessments of LEAD participants as appropriate in an effort to develop and implement Individual Success Plans that are responsive to identified needs.
 - b. Ensure quality Individual Success Plans are created to meet the complex needs of LEAD participants to the greatest extent possible.
 10. Work with LEAD Program Director to maintain up to date and accurate data and client notes in Julota and regularly consider and respond to the needs for dynamic information exchange with multiple community partners and grant funders.
 11. Comply with 42 CFR Part 2, HIPAA rules, as well as state confidentiality rules.
 12. Work closely with the LEAD Program Director to ensure program costs are sufficiently funded and request timely reviews of program operational expenses. Flex funds will be provided to Contractor to financially support clients who are actively engaged in the LEAD program and need short term funding for items such as housing, shelter, identification, food, clothing and other basic needs. These funds will be invoiced monthly and may not exceed the total amount set in Schedule B-1 and are encouraged to be used to the full extent.
 13. Ensure employees receive regular evaluations and are held to a professional standard of work.
 14. Provide regular training opportunities for employees related to safety and situational awareness, incident reporting and boundaries to ensure staff work within their scope of practice and do not engage in unsafe situations.

B. Service Eligibility

The target population of the LEAD & RNP Programs consist of four types of referrals: 1) Individuals who are engaged in law violations due to behavioral health challenges, continued drug use and/or extreme poverty. 2) Social Contact and 3) Pre-Trial Diversion referrals from officers and prosecutors of individuals with whom they have regular contact due to underlying behavioral health issues that relate to their involvement in the legal system. Contractor shall accept referrals from law enforcement and prosecuting attorney offices. 4) Community referrals from local agencies invited to participate in LEAD and through outreach done by LEAD and Recovery Navigator staff. These referrals will be vetted through the same process as Pre-Booking and Social Contact referrals to ensure

they still meet the basic program criteria. They may receive more short-term support from LEAD staff depending on their needs.

C. Program Requirements

- 1) Staffing
 - i) Contractor shall provide staffing sufficient to operate the LEAD program. Adequate capacity for operations must include clinical supervision, accounting and performance management, case management, intake and outreach coordination, participant programming facilitation, and collaboration with the LEAD advisory groups.
 - ii) Evergreen Recovery shall ensure that LEAD program staff have the demonstrated ability to work with complex individuals who experience acute symptoms and lifestyle patterns that are disruptive to their health and well-being. While staff experience may vary, all staff must be willing to provide field-based services, follow boundaries of job descriptions and comply with safety guidelines.
- 2) Retain program staff to provide Supervision and Case Management capacity.
 - a) Supervision shall be provided by a staff member with a clinical degree or sufficient years of experience. This person will not carry a caseload unless absolutely necessary and instead will devote time to supporting case managers in their roles and will serve as a main point of contact for the Program Director.
 - b) Case Management services shall be provided by no less than four (4) full-time staff members qualified to work with highly complex individuals as per the plan submitted as a response to the RFP. With increased funding in this contract, Contractor is expected to maintain 12 full time staff members as the program grows and referrals increase.
 - c) To serve 275 clients, the program will grow to employ eight (8) staff members to carry a full caseload of approximately 25 LEAD participants each and Outreach Specialists will carry a partial caseload with up to 25 participants if there is capacity to do so. If caseloads exceed 25 per full time case manager and threaten the integrity of the program, Evergreen Recovery will consult the LEAD Program Director about potential funding for the addition of staff or a pause in the acceptance of new referrals.
- 3) Contractor shall:
- 4) Provide administrative support sufficient to sustain the LEAD program functions.
 - b) Provide office space, furniture and equipment sufficient to support the LEAD case managers.
 - c) Provide administrative and clinical supervision of program direct service staff.

- a) Work with LEAD Program Director to modify program as necessary in response to potential changes relative to data collection and reporting.
- b) Work with LEAD Program Director to review LEAD budget and LEAD caseloads as needed to ensure adequate funding support for costs when/if program modifications are made and track spending carefully to ensure the program budget meets the monthly needs of clients served.

D. Reporting Requirements

- 1) LEAD SB and the HCA require all LEAD sites to use Julota, a cloud-based client tracking system. Snohomish County will purchase this software and Contractor shall sign a Software as a Services (SaaS) License Agreement with Julota. -. In addition, North Sound BHASO requires all RNP sites to use their provided Excel spreadsheet for quarterly reporting. Only the 3 staff hired under the Recovery Navigator Program will complete this documentation in addition to their Julota metrics. Expected program overarching outcomes include:
 - a) Reduction in jail admissions/reduction in jail bed day utilization.
 - b) Reduction in law enforcement responses.
 - c) Improved behavioral health conditions of LEAD participants.
 - d) Improved public safety and public order.
 - e) Connection to appropriate services
 - f) Resolution of outstanding legal issues

- 2) Contractor's LEAD staff will collect baseline data on participants newly admitted to the LEAD program to include Race/Ethnicity, Housing status, Health Insurance information, Criminal Legal System Contacts, Emergency Medical System Contacts and historical encounters with Law Enforcement. All data will be recorded in Julota. On a monthly basis, data will be collected on individual LEAD participants related to current utilization of these encounters as well as utilization of other first responder services. Further data including Participant Surveys, URICA assessments and readiness for change will also be collected at 6 months, 1 year and termination of program/grant. LEAD Program Director will coordinate with Contractor, HCA, North Sound BHASO and LEAD Support Bureau to collect appropriate data with metrics that may change over time. Contractor staff shall then support the Program Director by providing timely data to submit a monthly report which shall include the above and following data:
 - a) Drug trends;
 - b) Progress towards goals;
 - c) Connections to services
 - d) Participant Satisfaction; and
 - e) Performance and success measurements.

**Schedule B-1
Compensation (July 1, 2024-June 30, 2025)**

**Snohomish County Law Enforcement Assisted Diversion (LEAD)
and Recovery Navigator Program (RNP)**

BARS-Description	Number	Annual Salary Range	12 Month Cost
Salaries and Wages:			
Director of Outreach Programs	0.10	\$99,225.12	\$9,922.51
Case Management Supervisor	1	\$77,000-\$85,000	\$81,585.00
Senior Staff	1	\$65,000-\$73,000	\$71,650.00
Senior Case Manager	1	\$57,000-\$70,000	\$64,000.00
Case Managers	7	\$57,000-\$70,000	\$429,085.00
Outreach Specialists	2	\$57,000-\$70,000	\$121,500.00
Total Salaries & Wages			\$777,742.51
Benefits & Employer Taxes			\$311,097.00
HCA Retention Bonuses	10	\$500.00	\$5,000.00
Total Personnel Compensation			\$1,093,839.51
Expenses:			
Vehicle Expenses: Lease, Gas & Repairs			\$95,000
Truck Purchase and Expenses*			\$25,000*
Rent & Utilities			\$100,800
Cell phones			\$7,500
Professional Licenses & Training Fees			\$6,500
Insurance (Liability & Auto)			\$30,000
Machinery			\$5,000
Supplies			\$8,350
Total Expenses			\$278,150
Subtotal: Compensation & Expenses			\$1,371,990
Administrative Allowance (15%)			\$205,798
Client Flex Funds			\$200,000
TOTAL LEAD BUDGET			\$1,777,788

Not to exceed \$1,800,000.00 The above budget reflects the programmatic priorities as established by LEAD SB. The contractor shall submit properly executed invoices to the Program Director once a month (including invoices for expended flex funds, which will not be distributed in advance). Each invoice shall include an itemization of the positions and the number of hours worked. Each invoice shall also include an itemization of any reimbursable expenses incurred by the Contractor during the time period covered by the invoice, together with reasonable documentation substantiating such expenses (copies of receipts). Each invoice shall include the applicable administrative allowance. **The administrative allowance is designed to cover overages therefore there should be no billing that exceeds the amount listed in the specific budget line item.** Client Flex Fund expenditures should be documented with a monthly tracking spreadsheet and supporting receipts, invoiced monthly, and may not exceed the total amount set in Schedule B-1.

* A total of \$25,000 is being allocated to purchase a truck and cover associated expenses moving forward, including the purchase price, licensing, insurance, gas, oil changes, maintenance, and repairs, etc. The vehicle will become an Evergreen asset but can ONLY be used for the LEAD program (this is guidance from the North Sound BHASO) and cannot be shared among any other Evergreen programs, regardless of their similar funding sources, missions, etc. If the LEAD program ever dissolves, the truck must be sold, and the proceeds must be returned to North Sound BHASO.