

## **AGREEMENT FOR SERVICES**

THIS AGREEMENT is entered into between Northern Nevada Public Health, a political subdivision of the State of Nevada ("County") and Social Entrepreneurs Inc. (SEI), ("Contractor"), collectively (the "Parties").

### **WITNESSETH:**

WHEREAS, County desires to engage Contractor to render certain consulting services in Support of the "2025-26 Washoe SIM Planning and Implementation" (the "Project"); and

WHEREAS, County requires certain professional services in connection with the Project, as described in Exhibit "A" Scope of Work (the "Services"); and

WHEREAS, Contractor represents that it is duly qualified, ready, willing and able to provide the Services by virtue of its education, training and experience; and

NOW, THEREFORE, in consideration of the mutual promises contained herein, the Parties agree as follows:

### **ARTICLE 1 - EFFECTIVE DATE**

The effective date of this Agreement shall be April 1, 2025.

CONTRACTOR shall begin performance of services as provided herein upon notice to proceed and shall complete all Services identified in Exhibit A, Scope of Work in accordance with the Standard of Care as set forth in Article 5 herein no later than June 30, 2026, unless this Agreement is terminated sooner in accordance with its terms.

### **ARTICLE 2 - SERVICES TO BE PERFORMED BY CONTRACTOR**

Contractor agrees to perform and complete all Services identified in Exhibit A Scope of Work under this Agreement, and any amendment thereto in accordance with the Standard of Care as set forth in Article 5 herein. Contractor shall be responsible for the quality, technical accuracy, completeness and coordination of all reports, information, specifications and other items and services furnished under this Agreement and any amendments hereto. County reserves the right to inspect, comment on, and request revision of, all Services identified in Exhibit A and any amendments thereto performed by Contractor prior to acceptance, and Contractor warrants that such Services shall be fit and sufficient for the purposes expressed in, or reasonably inferred from, this Agreement and any amendments hereto.

Failure to provide major deliverables, including, but not limited to, Services identified in Exhibit A, Scope of Work, shall constitute a material breach of this Agreement, unless waived in writing by the County.

### **ARTICLE 3 - COMPENSATION**

#### **3.1 Compensation for Services**

For Services defined in Section 1 above, Contractor's compensation shall be determined on a time and material basis, in accordance with the Fee Schedule described in Exhibit "A", which is attached hereto and incorporated by reference as part of the Agreement and shall not exceed the sum of \$150,000.00. Contractor shall satisfy its obligations hereunder without additional cost or

expense to County during the term of this Agreement other than the heretofore stated compensation and the fee schedule described in Exhibit A. The Fee Schedule may be renegotiated at the end of one (1) year upon request by either the County or the Contractor. Renegotiated fees are subject to approval by the District Health Officer. The actual costs charged for the work by Contractor in accordance with this provision shall be full compensation to Contractor for all Services and duties required by the Scope of Work, including, but not limited to: costs of supplies, facilities and equipment; costs of labor and services of employees, contractors and sub-contractors engaged by Contractor; travel expenses, telephone charges, typing, duplicating, costs of insurance, and all items of general overhead. Contractor shall submit billings on a monthly basis.

### 3.2 Compensation for Additional Services

If County requests Contractor to perform additional services, other than those required to be performed under Services identified in Exhibit A, Scope of Work, the cost of such additional services shall be determined prior to commencing additional work. All additional services and amount of payment must be authorized in writing by County prior to commencing any work for such services.

### 3.3 Methods and Times of Payment

Contractor shall submit to County monthly progress invoices indicating the number of hours each employee provided services and other allowed direct expenses. Payment to Contractor for work on the Project shall be made within thirty (30) days after receipt and approval of Contractor's invoice, said approval not to be unreasonably withheld. Payment by County of invoices or requests for payment shall not constitute acceptance by County of work performed on the Project by Contractor. No penalty shall be imposed upon the County for payment(s) received by Contractor after thirty days.

### 3.4 Dispute of Work

County shall notify Contractor in writing within thirty (30) days of receipt of the work, or portion of work, which is not approved. For work, or portions of the work, which are unapproved, the County and Contractor shall develop a mutually acceptable method to resolve the dispute within thirty (30) days of receipt by the Contractor of notice from the County. If the County and Contractor cannot reasonably agree to remedy the dispute of unapproved work within the thirty-day period, the work shall be terminated or suspended per Article 12.

## ARTICLE 4 - TIME SCHEDULE FOR COMPLETION

The Services identified in Exhibit A, Scope of Work on the Project shall be diligently performed and be completed no later than June 30, 2026. Contractor shall be granted time extensions for items within the phases of the Project in writing by County if the time schedules cannot be met because of delays beyond Contractor's reasonable control, including, but not limited to, County's failure to furnish information, or to approve or disapprove Contractor's work promptly. Contractor will provide to County a monthly report including a schedule identifying progress or work completed, problems or difficulties being encountered, work to be initiated during the following month and other useful information. This report will be submitted on the first day of each month and will be in a format suitable for submittal to other interested agencies. Contractor's failure to submit promptly the monthly progress report may cause delay in payment from the County.

## ARTICLE 5 – FORCE MAJEURE

Neither party shall be deemed to be in violation of this Agreement if it is prevented from performing any of its obligations hereunder due to strikes, failure of public transportation, civil or military authority, act of public enemy, accidents, fires, explosions, or acts of God, including without limitation, earthquakes, floods, winds, or storms. In such an event the intervening cause must not be through the fault of the party asserting such an excuse, and the excused party is obligated to promptly perform in accordance with the terms of this Agreement after the intervening cause ceases.

## ARTICLE 6 - OPINIONS OF COST AND SCHEDULE

Since Contractor has no control over the cost of labor, materials, equipment or services furnished by others, including over any other contractors', subcontractors', or vendors' methods of determining prices, or over competitive bidding or market conditions, Contractor's cost estimates shall be made on the basis of qualification and experience.

Since Contractor has no control over the resources provided by others to meet contract schedules, Contractor's forecast schedules for completion of Services shall be established based on generally acceptable schedules for and performance standards of similarly situated professionals qualified and experienced to perform the Services. Contractor cannot and does not guarantee that proposals, bids or actual project costs will not vary from its cost estimates or that actual schedules will not vary from its forecast schedules.

## ARTICLE 7 - INDEPENDENT CONTRACTOR

Contractor is performing the services and duties required under this Agreement as an independent Contractor and not as an employee, agent, or partner of the County.

1. Contractor undertakes performance of the Services as an independent contractor and shall be wholly responsible for the methods of performance.
2. Contractor may retain employees or other personnel to perform the services required by this Agreement. Such employees or other personnel will be the obligation of the Contractor. Contractor's employees or other personnel are not County employees.
3. Unless otherwise provided in Exhibit A, Contractor is responsible for all expenses without reimbursement.
4. Neither Contractor nor any personnel are employees of County and waive any and all claims to benefits otherwise provided to employees of the County, including, but not limited to, health insurance, Nevada Public Employees Retirement System (PERS) or other retirement benefits, unemployment benefits, and liability and worker's compensation insurance.
5. Contractor represents and warrants that if Contractor, or any employee of Contractor who will be performing services under this Agreement, is a current employee of the County or was employed by the County within the preceding 24 months, Contractor has disclosed the identity of such persons, and the services that each such person will perform.
6. County and Contractor agree that this Agreement does not constitute an exclusive relationship. Nothing in this Agreement shall be construed as a limitation upon the right of the Contractor to engage in any other consulting agreement, service contract, business venture or other activity.

## ARTICLE 8 - PERMITS AND LICENSES

Contractor shall maintain active and in good standing all necessary permits, certificates, and licenses necessary to allow Contractor to perform the Services. Contractor shall not be responsible for procuring permits, certificates, and licenses required for any construction unless such responsibilities are specifically assigned to Contractor in Exhibit A, Scope of Services.

## ARTICLE 9 - COUNTY'S RESPONSIBILITY

County shall provide any information authorized by law in its possession that is requested by Contractor and is necessary to complete the Project. County shall assist Contractor in obtaining access to public and private lands so Contractor can perform the Services. County shall examine all studies, reports, sketches, estimates, specifications, drawings, proposals, and other documents presented by Contractor and shall render decisions pertaining thereto within a reasonable time so as not to delay the work of Contractor.

## ARTICLE 10 – PUBLIC RECORDS

Public Records. Pursuant to NRS 239.010, information or documents received from Contractor may be open to public inspection and copying. The County has a legal obligation to disclose such information unless a particular record is made confidential by law. Contractor may label specific parts of an individual document as “trade secret” or “confidential” in accordance with NRS, provided that Contractor thereby agrees to indemnify and defend the County for honoring such a designation. The failure to so label any document that is released by the County shall constitute a complete waiver of any and all claims for damages caused by any release of records.

## ARTICLE 11 – INSPECTION AND AUDIT

### 11.1 Books and Records.

Contractor agrees to keep and maintain under generally accepted accounting principles (GAAP) full, true and complete records, contracts, books, and documents as are necessary to fully disclose to the County, or their authorized representatives, upon audits or reviews, sufficient information to determine compliance with all state and federal regulations and statutes.

### 11.2 Inspection and Audit.

Contractor agrees that the relevant books, records, including, without limitation, relevant accounting procedures and practices of contractor or its subcontractors, financial statements and supporting documentation, and documentation related to the work product shall be subject, at any reasonable time, to inspection, examination, review, audit, and copying at any office or location of contractor for such records may be found with or without notice by the County or its representatives. With regard to any federal funding, any relevant federal agency or any of their authorized representatives may inspect or audit as set forth in this Agreement. All subcontracts shall reflect requirements of this section.

### 11.3 Period of Retention.

All books, records, reports, and statements relevant to this Agreement must be retained a minimum of 3 years, and for 5 years if any federal funds are used pursuant to this Agreement. The retention period runs from the date of payment for the relevant goods or services by the County, or from the date of termination of this Agreement, whichever is later. Retention time shall be

extended when an audit is scheduled or in progress for a period reasonably necessary to complete an audit and/or to complete any administrative and judicial litigation which may ensue.

## ARTICLE 12 - TERMINATION OR EXTENSION OF CONTRACT

12.1 Termination Without Cause. This Agreement may be terminated for any reason by either party by giving the other party written notice of the intent to terminate. The notice must specify the date upon which the termination will be effective, which date may not be less than 15 calendar days from the date of service of the notice. Only services satisfactorily performed up to the date of receipt of notice shall be compensated by County and such compensation shall be pursuant to the terms of this Agreement. If this agreement is unilaterally terminated by the County, Contractor shall use its best efforts to minimize the cost to the County and Contractor will not be paid for any cost that Contractor could have avoided.

12.2 Termination by Non-appropriation. The County may terminate its participation in this Agreement effective immediately by providing written notice if for any reason the County's funding source is not appropriated or is withdrawn, limited, or impaired. The County will make reasonable efforts to ensure payment for services rendered by the Contractor. The Contractor shall agree to hold the County free from any charges or penalties except for those already incurred through the date of notice of cancellation.

12.3 Termination with Cause for Breach. A breach may be declared with or without termination. A notice of breach and terminations shall specify the date of termination of the Agreement, which shall not be sooner than the expiration of the Time to Correct, if applicable, allowed under the Agreement. This Agreement may be terminated by either party upon written notice of breach to the other party on the following grounds:

a. If Contractor fails to provide or satisfactorily perform any of the conditions, work, deliverables, goods, or services called for by this Agreement within the time requirements specified in this Agreement or within any granted extension of those time requirements; or

b. If any state, county, city, or federal license, authorization, waiver, permit, qualification or certification required by statute, ordinance, law, or regulation to be held by Contractor to provide the goods or services required by this Agreement is for any reason denied, revoked, debarred, excluded, terminated, suspended, lapsed, or not renewed; or

c. If Contractor becomes insolvent, subject to receivership, or becomes in voluntarily or involuntarily subject to the jurisdiction of the Bankruptcy Court; or

d. If the County materially breaches any material duty under this Agreement and any such breach impairs the Contractor's ability to perform; or

e. It is found by the County that any quid pro quo or gratuities in the form of money, services, entertainment, gifts, or otherwise were offered or given by Contractor, or any agent or representative of Contractor, to any officer or employee of the County with a view toward securing a contract or securing favorable treatment with respect to awarding, extending, amending, or making any determination with respect to the performing of such Agreement; or

f. If it is found by the County that Contractor has failed to disclose any material conflict of interest relative to the performance of this Agreement.

12.4 Time to Correct. Unless the breach is not curable, or unless circumstances do not permit an opportunity to cure, termination upon declared breach may be exercised only after service of formal written notice as specified in the notice section of this Agreement, and the subsequent failure of the breaching party within 15 calendar days of service of that notice to provide evidence, satisfactory to the aggrieved party, showing that the declared breach has been corrected. Upon a notice of breach, the time to correct and the time for termination of the contract upon breach shall run concurrently, unless the notice expressly states otherwise.

12.5 Winding Up Affairs Upon Termination. In the event of termination of this Agreement for any reason, the parties agree that the provisions of this section survive termination:

a. The parties shall account for and properly present to each other all claims for fees and expenses and pay those which are undisputed and otherwise not subject to set off under this Agreement. Neither party may withhold performance of winding up provisions solely based on nonpayment of fees or expenses accrued up to the time of termination;

b. Contractor shall satisfactorily complete work in progress at the agreed rate, or a pro rata basis if necessary, if so requested by County;

c. Contractor shall execute any documents and take any actions necessary to effectuate an assignment of this contract if so requested by the County;

d. Contractor shall preserve, protect and promptly deliver into County possession all proprietary information

e. Notwithstanding the above, Contractor shall not be relieved of any liability to the County for damages sustained by the County by virtue of any breach of this Agreement by the Contractor, and the County may withhold any payments to the Contractor for the purposes of set-off until such time as the exact amount of damages due the County from the Contractor may be determined.

#### ARTICLE 13 - NONDISCLOSURE OF PROPRIETARY INFORMATION

Contractor shall consider all information provided by County to be proprietary unless such information is available from public sources, was known to Contractor prior to the execution of this Agreement, was received by Contractor from a third-party source not under any obligation of confidentiality to the County or is required by law or ordered to be disclosed in a regulatory or judicial proceeding. Contractor shall not publish or disclose proprietary information for any purpose other than the performance of the Services without the prior written authorization of County or in response to legal process or as required by the regulations of public entities.

#### ARTICLE 14 - NOTICE

Notices and other communications in connection with this Agreement shall be in writing and directed to the parties at the addresses stated in this Agreement. Email or facsimile shall be used to

To County:

Chad Kingsley, District Health Officer  
Northern Nevada Public Health  
1001 East 9<sup>th</sup> Street  
Reno, NV 89512

To Contractor:

Kelly Marschall, Project Lead  
Social Entrepreneurs, Inc.  
6548 S. McCarran Blvd. Ste. B.  
Reno, NV 89509

Nothing contained in this Article shall be construed to restrict the transmission of routine communications between representatives of Contractor and County.

#### ARTICLE 15 - UNCONTROLLABLE FORCES

Neither County nor Contractor shall be considered to be in default of this Agreement if delays in or failure of performance shall be due to uncontrollable forces the effect of which, by the exercise of reasonable diligence, the non-performing party could not avoid and is not reasonably foreseeable at the time of entering into this Agreement. The term "uncontrollable forces" shall mean any event which results in the prevention or delay of performance by a party of its obligations under this Agreement and which is beyond the control of the non-performing party. It includes, but is not limited to, fire, flood, earthquakes, storms, lightning, epidemic, war, riot, civil disturbance, sabotage, inability to procure permits, licenses, or authorizations from any state, local, or federal agency or person for any of the supplies, materials, accesses, or services required to be provided by either County or Contractor under this Agreement, strikes, work slowdowns or other labor disturbances, and judicial restraint. Contractor shall be paid for services performed prior to the delay plus related costs incurred attributable to the delay.

Neither Party shall, however, be excused from performance if nonperformance is due to uncontrollable forces which are removable or remediable nor which the non-performing Party could have, with reasonable dispatch removed or remedied. The provisions of this Article shall not be interpreted or construed to require Contractor or County to prevent, settle, or otherwise avoid a strike, work slowdown, or other labor action. The non-performing Party shall upon being prevented or delayed from performance by an uncontrollable force, immediately give written notice to the other Party describing the circumstances and uncontrollable forces preventing continued performance of the obligations of this Agreement.

#### ARTICLE 16 - GOVERNING LAW-VENUE

Nevada law governs this Agreement and all adversarial proceedings arising out of this Agreement or arising out of planning or constructing the Project outlined in Article 2 – Services to be Performed by Contractor. Venue for all adversarial proceedings arising out of this Agreement or arising out of planning or constructing the Project outlined in Article 2 – Services to be Performed by Contractor shall be in state district court in Washoe County, Nevada.

#### ARTICLE 17 - MISCELLANEOUS

##### 17.1 Nonwaiver

### 17.1 Nonwaiver

A waiver by either County or Contractor of any breach of this Agreement shall not be binding upon the waiving Party unless such waiver is in writing. In the event of a written waiver, such a waiver shall not affect the waiving party's rights with respect to any other or further breach.

### 17.2 Severability

If any provision of this Agreement is held to be unenforceable, then that provision is to be construed either by modifying it to the minimum extent necessary to make it enforceable or disregarding it. If an unenforceable provision is modified or disregarded in accordance with this Article 17, the rest of the Agreement is to remain in effect as written, and the unenforceable provision is to remain as written in any circumstances other than those in which the provision is held to be unenforceable.

### 17.3 Attorney Fees

The prevailing party in any dispute arising out this Agreement or Contractor's work described in Exhibit A – Scope of Work, is entitled to reasonable costs and attorneys' fees.

## ARTICLE 18 - INTEGRATION AND MODIFICATION

This Agreement represents the entire and integrated agreement between the Parties and supersedes all prior negotiations, representations, or agreements, either written or oral. This Agreement may be amended only by a written instrument signed by each of the Parties. Unless otherwise specified in writing, if there is any inconsistency between the terms of this Agreement and any other agreement between the Parties, the terms of this Agreement shall control.

**In the event of any conflict between the documents that make up this Agreement, the documents will prevail in the following order: the Agreement for Professional Consulting Services Agreement, Insurance Exhibit "B" and then any other agreement / exhibits.**

## ARTICLE 19 - SUCCESSORS AND ASSIGNS

County and Contractor each binds itself and its directors, officers, partners, successors, executors, administrators, assigns and legal representatives to the other party to this Agreement and to the partners, successors, executors, administrators, assigns, and legal representatives of such other party, in respect to all covenants, agreements, and obligations of this Agreement.

## ARTICLE 20 - ASSIGNMENT

Neither County nor Contractor shall assign, sublet, or transfer any rights under or interest in (including, but without limitation, monies that may become due or monies that are due) this Agreement without the written consent of the other, except to the extent that the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement. Nothing contained in this paragraph shall prevent Contractor from employing such independent contractors, associates, and subcontractors, as he may deem appropriate to assist him in the performance of the Services hereunder.

## ARTICLE 21 - OWNERSHIP OF DOCUMENTS AND PRODUCTS



Unless otherwise specified in Exhibit A, Contractor assigns to County all rights to all products, reports, documents, photographs, videos, data, and drawings produced by Contractor as a result of its services to County during the term of this Agreement. All such materials shall be delivered into County possession by Contractor upon completion, termination, or cancellation of this Agreement.

#### ARTICLE 22 - THIRD PARTY RIGHTS

Nothing herein shall be construed to give any rights or benefits to anyone other than County and Contractor.

#### ARTICLE 23 – INDEMNIFICATION AND INSURANCE

Washoe County has established specific indemnification and insurance requirements for agreements/contracts with contractors, engineers, and architects to help assure that reasonable insurance coverage is maintained. Indemnification and hold harmless clauses are intended to assure that contractors accept and are able to pay for the loss or liability related to their activities. Exhibit “B” Insurance Specifications is included by reference. All conditions and requirements identified in this exhibit shall be completed prior to the commencement of any work under this Agreement.

#### ARTICLE 24 – LIMITED LIABILITY

County will not waive and intends to assert available defenses and limitations contained in Chapter 41 of the Nevada Revised Statutes. Contract liability of both parties shall not be subject to punitive damages. Actual damages for the County’s breach of this Agreement shall never exceed the amount of funds that have been appropriated for payment under this Agreement, but not yet paid, for the fiscal year budget in existence at the time of the breach.

#### ARTICLE 25 – LOBBYING

Contractor agrees, whether expressly prohibited by federal law, or otherwise, that no funding associated with this Agreement will be used for any purpose associated with or related to lobbying or influencing or attempting to lobby or influencing for any purpose the following:

23.1 Any federal, state, county or local agency, legislature, commission, counsel or board:

23.2 Any federal, state, county or local legislator, commission member, council member, board member, or other elected official; or

23.3 Any officer or employee of any federal, state, county or local agency, legislature, commission, counsel or board.

Contractor agrees to conform to the regarding influence lobbying requirements as set forth in the Byrd Anti-lobbying Amendment, 31 U.S.C. 1352.

#### ARTICLE 26 - ORGANIZATION’S CERTIFICATION

Contractor, its principals and agents, to the best of its knowledge and belief:

- a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal or state department or agency;
- b) Have not within a three year period preceding this Agreement been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection

*Service Agreement –*

of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

c) Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offenses enumerated in (ii) above;

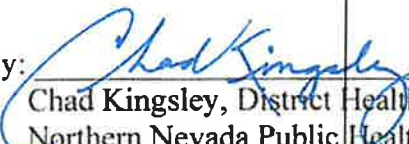
d) Have not within a three-year period preceding this Agreement had one or more public transactions (Federal, State, or local) terminated for cause or default; and

e) Understand that a false statement on this certification may be grounds for rejection or termination of this Agreement. In addition, under 18 USC Sec. 1001, a false statement may result in a fine of up to \$10,000 or imprisonment for up to 5 years, or both.

IN WITNESS WHEREOF, the parties have executed this Agreement.

WASHOE COUNTY:

Dated this 20 day of March, 2025

By:   
Chad Kingsley, District Health Officer  
Northern Nevada Public Health

CONTRACTOR:

Dated this 25 day of March, 2025

By:   
Kelly Marschall, Project Lead  
Social Entrepreneurs, Inc.



# 2025-26 Washoe SIM Planning and Implementation

Submitted by Social Entrepreneurs, Inc. (SEI)

January 31, 2025

## Project Summary and Background

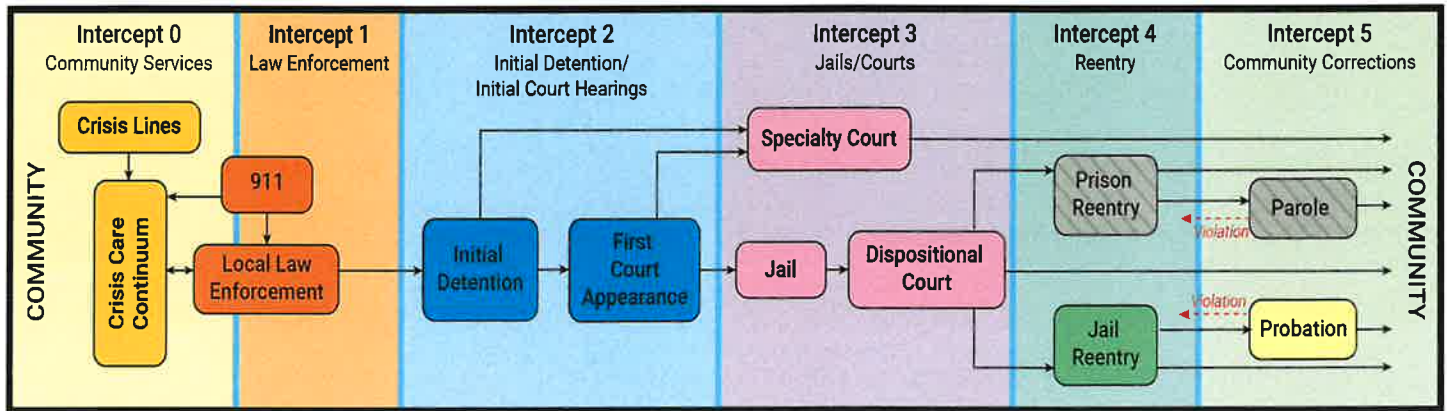
This document provides a scope of work (SOW) and budget with a detailed work plan showing the tasks and timeframes envisioned necessary to continue to coordinate and manage the 2025-26 Washoe Region Sequential Intercept Model (SIM) strategic framework and initiatives implementation project. The primary purpose of the SIM is to prevent the criminalization of mental illness and promote collaboration between criminal justice and behavioral health systems so that fewer people with mental illness are in jail tomorrow than there are today, focusing on providing appropriate services and connections within six intercepts.

This SOW is provided to identify the scope, approach, deliverables, timing, and fees associated with project management and implementation of SIM initiatives in the Washoe Region as defined in the SIM strategic framework that was developed in 2023-24. It builds upon the Washoe Region SIM work supported by SEI in prior years, coordinates efforts with the Washoe Crisis Response Implementation Plan project currently underway, and incorporates key takeaways from the January 2024 Criminal Justice and Behavioral Health Summit held in Washoe County.

The 2024 Washoe County Behavioral Health Summit aimed to improve criminal justice responses to individuals with behavioral health challenges, employing the SIM for collaborative strategy identification. The primary purpose of the Summit was to develop recommendations designed to promote a more efficient and effective justice system for those individuals who come to court and need behavioral health services. Proceedings included plenary sessions, panel discussions, and breakout sessions focused on understanding and implementing the SIM, sharing experiences, and identifying actionable system improvements. Over 120 attendees participated in the Summit, representing a broad spectrum of local leaders, experts, community members, and stakeholders from various sectors who are all dedicated to enhancing responses to behavioral health challenges within the criminal justice system. Key highlights centered on prioritizing policy, practice, and data collection enhancements for effective model implementation, and emphasizing leadership, policy adjustments, and resource allocation. Data collection priorities were ranked by participants to lay the foundation for a data development agenda. The following table shows the top-ranked data priority within four of the SIM intercepts:

Intercept 1 <i>Law Enforcement</i>	<ul style="list-style-type: none"><li>• #/% of calls with primary concern related to mental illness or substance use (including all subsets)</li></ul>
Intercept 2 <i>Initial Detention/Court Hearings</i>	<ul style="list-style-type: none"><li>• Rate of diversion to community-based services at initial hearings, as indicated by active engagement with a service provider, by agency initiating or requesting the diversion (e.g., magistrate, public defenders' office, prosecutor's office, judge)</li></ul>
Intercept 3 <i>Jails/Courts</i>	<ul style="list-style-type: none"><li>• Rates of recidivism after program completion (defined in accordance with National Association of Drug Court Professionals recommendations)</li></ul>
Intercept 4 <i>Reentry</i>	<ul style="list-style-type: none"><li>• Rate of recidivism after release</li></ul>

An effective response to the needs of individuals with mental health and co-occurring disorders requires committed stakeholders across a spectrum of services and time. From screening and assessment to diagnosis, emergency health responses, probation and beyond, effective mental health responses must be appropriately tailored to the individual as well as available services in the community. The Leading Change Guide is a practical tool for convening stakeholders across systems and developing a plan to address mental health needs in a community. This resource was used to help guide planning during 2023-24, which led to the development of a strategic framework for the Washoe region. The strategic framework is organized around key issue areas or initiatives that impact one or more of the six SIM intercepts noted below:



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The following figure outlines the planning process that was used to inform the Washoe region's strategic framework and the initiatives detailed within it.



Figure 2. The Community-Based Mental Health Response Mapping Process

**With the Washoe region SIM strategic framework in place, the focus of the scope of work for 2025-26 is on implementation, evaluation, and sustainability.**

## Objective

The main objective of the project is to use the SIM framework to:

- provide project management support to implement the Washoe region's strategic framework by addressing key issue areas or initiatives within the criminal justice and behavioral health systems to "intercept" individuals before they penetrate deeper into the system.

## Scope and Approach

To achieve the objective outlined above, SEI will use a four-phased approach. The following is a summary of the phases and milestones that inform the proposed scope and approach to the project:

1. **SIM Project Oversight and Core Team Activities** — The milestone in this phase is review and oversight by the Core Planning Team to achieve the vision and goals for the SIM strategic framework. Activities include convening the Core Planning Team, providing direction on and tracking the status of initiative implementation, and identifying key partners to engage.

2. **Meetings and Collaboration** — The milestone in this phase is the identification of all efforts underway within the region that support the achievement of the strategic framework. Meetings will be held that focus on initiative objectives and action steps with updates on timing from leads for each initiative. Up to four issue areas will be supported at any one time by the SEI team, while all initiatives underway will be tracked to identify the outcomes of the strategic framework. The strategic framework will be used to measure the progress of initiatives, and the collaboration needed with key partners to implement the ideal system. Ad hoc meetings needed to progress initiatives will be scheduled and facilitated as needed.
3. **SIM Initiative Support** — The milestone for this phase is the action plan tracker quarterly updates providing the status on implementation for initiatives in the strategic framework. SEI will have one team resource assigned to each issue area with additional support as needed to foster coordination, communication, and collaboration to achieve the action steps necessary. Status will be tracked and documented monthly and rolled up into quarterly reports for the Core Team and behavioral health leadership meetings.
4. **Project Management** — The milestones of this phase are status reports and invoices that outline activities completed and measure the progress of the project in terms of time and budget. To achieve this milestone, SEI will manage all communication and coordination, internal and external project management activities and meetings, task management, status reporting, and invoicing.

A [detailed project workplan](#) begins on page 8 which outlines the tasks, timing, and resources envisioned to support full implementation for all aspects of this project. Note that this workplan will be reviewed and revised as needed during project kick-off activities to ensure that proposed tasks build upon and consider work being completed during 2023-24 project activities.

This is a complex project that will engage a number of key partners from a variety of organizations and sectors, including but not limited to Washoe County, the court system, the behavioral health system, and policymakers. It is important to clarify roles and responsibilities to ensure this is an investment that meets Northern Nevada Public Health's (NNPH) expectations.

SEI is responsible for the following activities under a potential contract with NNPH:

- Provide planning consultation to the Core Team and support Washoe County staff with requested meetings via virtual platforms
- Provide all materials to the Core Planning Team in advance of meetings for their review
- Provide final deliverables to NNPH and the Core Team for review and feedback
- Revise materials based on feedback
- Create tools and templates to support the planning process
- Support initiative implementation and ad hoc group convenings as requested (within the allocated budget)
- Create and manage a tracker to identify the status of strategic framework initiatives
- Provide on-demand communication, outreach, and ongoing collaboration to support the project
- Ensure equity is embedded in all planning activities
- Identify and communicate project risks and suggest strategies to mitigate these risks



- Provide project management and coordination in alignment with SEI's scope of work

Washoe County will be responsible for the following activities:

- Support and conduct outreach and engagement with key partners in the Washoe Region to ensure an inclusive and comprehensive planning and implementation process
- Participate in the Core Team and provide leadership and facilitation for the behavioral health leadership meetings
- Provide guidance and direction on the scope of work and revision needed as the project evolves, particularly related to meeting frequency of various groups
- Help publicize the project and calendar meetings
- Review meeting materials and deliverables and provide feedback on a regular basis, including reviewing and approving the final deliverables
- Assist in identifying and securing data
- Communicate project risks to the SEI team and collaborate to identify strategies to mitigate these risks
- Develop meeting materials, agendas, and other materials for initiative implementation in the strategic framework where the county is identified as the lead
- Ensure Washoe County stakeholders participate in implementation and tracking as needed
- Provide support throughout the project or if unable to do so, notify SEI promptly

### Deliverables

Our understanding is that the following are the primary deliverables that will result from this project:

- Implementation support
- A strategic framework tracker
- Progress status reports

Other deliverables will include agendas, meeting minutes and documentation of convenings, the strategic framework tracker, and reports for the behavioral health leadership participants at quarterly meetings.

### Project Team

SEI has invested in understanding and applying our strengths to all projects. Each team member has completed the CliftonStrengths Assessment to identify and maximize our strengths, both individually and as a group. Our data shows that collectively we are driven by relationships, we think strategically about what is and what could be, and we consistently execute projects on behalf of our clients. We partner with our clients to help them establish a vision as well as make their vision a reality.



SEI is well positioned to support Washoe County, having recently completed several related projects for the NNPH and the county. In June 2021, SEI began work on the first year of the Washoe County Behavioral Health Crisis Response System Implementation Planning (CRSIP) project, which included project planning, organization, and management; data collection and analysis; and implementation planning, including convening subcommittees related to the components of the crisis response system and additional ad hoc workgroups as well as the establishment of the Leadership Council and Technical Advisory Committee, and documenting the work of these convenings into an implementation plan. SEI has continued to support the CRSIP implementation since 2022.

In 2023-2024, SEI helped plan, facilitate, and document the day and a half 2024 Washoe County Behavioral Health Summit related to SIM implementation in the Washoe region. This Summit resulted in a proceedings document as well as other deliverables that have been foundation for SIM planning and implementation.

A brief overview of the experience of the SEI team members assigned to the project is shown below; note that SEI may add or substitute resources as needed to support project objectives. SEI is an Employee Operated Trust established as a C Corporation in Nevada.

**Kelly Marschall, MSW will serve as project lead and a facilitator for this project. She is the contract point of contact and will work with the Core Team and on one initiative through 2025.** Kelly is President and Principal of SEI and has over 35 years of experience working in and assisting nonprofit organizations. She has planned, administered, and provided direct services at both local and state levels, as well as provided regulatory oversight and planning for the state of Nevada. Kelly is a skilled facilitator and community planner, and as such, has worked with county commissions, multiple state agencies, and several national initiatives. While at SEI, Kelly has provided technical assistance, project management, and consulting services to numerous organizations and agencies throughout Nevada and California. Kelly was the project lead for, and facilitated, the 2023 statewide behavioral health summit, working with both Judge Lu and Judge Walker to plan all aspects of the summit. She was also the project lead for the 2024 Washoe County Behavioral Health Summit described above. She is highly skilled in identifying system improvement opportunities and working with those involved in implementing changes. Kelly Marschall earned a master's degree in social work, with high honors, from the University of Nevada, Reno and received a bachelor's degree in psychology from Pennsylvania State University.

**Vanessa Helfrick Paulus, MS will serve as the lead for project tracking activities, support the Core Team, take the lead on documentation, act as the communication hub for the project with support from Deanna Lyons and the rest of the project team, and support initiatives.** She has 11 years of experience working for nonprofit organizations that serve children and families. In her previous role as a Senior Policy Analyst at the National Council of Juvenile and Family Court Judges, she interfaced with courts nationwide, developed and coordinated tailored technical assistance, publications, and conference sessions. She holds a certification in family life education from the National Council on Family Relations and has a master's degree in human development and family science from the University of Nevada, Reno.

**Marika Baren will support implementation for initiatives in the strategic framework and participate in Core Team meetings in 2026.** Marika has worked as the executive director of the Down Syndrome Network of Northern Nevada, and prior to that at the CARE Chest of Sierra Nevada. In these roles, she researched and implemented practices to improve governance, team management, and developed new programming. She is a

Manager at SEI and has a bachelor's degree in English and Spanish, and graduated Summa Cum Laude from the University of Nevada, Reno.

**Deanna Lyons will support scheduling for the Core Team and provide organization and communications support and scheduling throughout the project.** She came to SEI with several years of experience in the meetings and travel industry. She previously held various positions including the Director of Conference and Travel Management for a national non-profit organization. In that position, Deanna managed various size events, ranging from 10 to 1,200 attendees. Those events were held in various locations throughout the US, and Deanna's team was responsible for all travel and meeting logistics. The work included site search, contract negotiations, AV (audio visual) negotiations and planning, event planning, and travel planning. Deanna also previously owned and managed a small travel agency. Deanna holds a degree from the University of Nevada, Reno in Business Management with a major in Business Finance.

**Paul Pfotenhauer will set up the project in our accounting systems and will issue invoices and manage all expenses eligible for reimbursement.** Paul came to SEI in 2020 with over 35 years of experience in Accounting, Finance, and Operations Management. Paul provides day-to-day financial support, client analysis, and regulatory compliance at SEI. He also provides support for client projects ranging from basic proposal development to financial modeling and assistance. Paul earned a bachelor's degree in business with an emphasis in Finance and Computer Science from Iowa State University, Ames Iowa.

**Kris Barats will ensure all our data systems have an accurate depiction of the project and will upload the project into our project management software.** Kris supports data and internal systems at SEI. She came to SEI in 2021 with over 20 years of experience as a Systems Analyst. She supports the team by managing or building tools that help to streamline both internal and external projects. She has created numerous websites.

## Budget Summary

Estimated fees are based on the scope of the project and on the division of responsibilities as outlined in the scope and approach section. SEI will begin work on April 1, 2025, upon receipt of an executed contract.

Professional fees are based on estimated hours to accomplish all tasks at hourly rates of \$235 for Principal (Kelly Marschall); \$205 for Manager (Marika Baren) and Controller (Paul Pfotenhauer); \$145 for Associates (Vanessa Helfrick Paulus and Judy Bartlett); and \$120 for other assigned staff (Deanna Lyons and Kris Barats). Jessie Henderson (\$175) will consult on the strategic framework and initiatives' implementation as a subject matter expert and SEI strategic partner.

**The total not to exceed for the full project is \$150,000.** This consists of \$149,908.75 in professional fees, and \$91.25 in expenses for mileage for in-person meetings. A budget summary by phase for the project is summarized on the following page.

SEI will invoice the Northern Nevada Public Health monthly for all professional fees and expenses incurred in the previous month, as aligned with the contract and the not to exceed amount. Should expenses be lower than anticipated, the unexpended funds can be used for professional fees incurred based on the total not to exceed amount in the executed contract.



	<b>SEI Hours</b>	<b>Professional Fees</b>	<b>Expenses</b>	<b>Total Cost</b>
Phase 1: SIM Project Oversight and Core Team Activities	106.25	\$19,156.25	\$0.00	\$19,156.25
Phase 2: Meetings and Collaboration	100	\$17,120.00	\$91.25	\$17,211.25
Phase 3: SIM Initiative Support	426.5	\$77,232.50	\$0.00	\$77,232.50
Phase 4: Project Management	203	\$36,400.00	\$0.00	\$36,400.00
<b>Totals</b>	<b>835.75</b>	<b>\$149,908.75</b>	<b>\$91.25</b>	<b>\$150,000.00</b>

### Expenses

Estimated expenses include an allowance of \$91.25 to cover travel time to and from meetings held in person, with a local resource from SEI traveling within the Washoe region.

<b>Expense Type</b>	<b>Expense Calculation</b>	<b>Total Cost</b>
<b>Mileage</b>	Up to \$91.25 is allocated for mileage within Washoe County to attend in-person meetings throughout the year. Mileage will be billed at the GSR rate.	\$91.25
	Total Estimated Expenses	\$91.25

## Detailed Work Plan — Scope of Work

Task #	Task	Start Date	End Date	Kelly Marshall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfotenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
<b>Phase 1: SIM Project Oversight and Core Team Activities</b>											
1	Plan, conduct, and document kickoff meeting with the SEI Team.	4/1/2025	4/15/2025	1.5	1.5	2	1.5				
2	July 2025 Core Team.	7/1/2025	7/31/2025	1.75		2	1.5				
3	August 2025 Core Team.	8/1/2025	8/31/2025	1.75		2	1.5				
4	September 2025 Core Team.	9/1/2025	9/30/2025	1.75		2	1.5				
5	October 2025 Core Team.	10/1/2025	10/31/2025	1.75		2	1.5				
6	November 2025 Core Team.	11/1/2025	11/30/2025	1.75		2	1.5				
7	December 2025 Core Team.	12/1/2025	12/31/2025	1.75	1.75	2	1.5				
8	January 2026 Core Team.	1/1/2026	1/31/2026		1.75	2	1.5				
9	February 2026 Core Team.	2/1/2026	2/28/2026		1.75	2	1.5				
10	March 2026 Core Team.	3/1/2026	3/31/2026		1.75	2	1.5				
11	April 2026 Core Team.	4/1/2026	4/30/2026		1.75	2	1.5				
12	May 2026 Core Team.	5/1/2026	5/31/2026		1.75	2	1.5				
13	June 2026 Core Team.	6/1/2026	6/30/2026		1.75	2	1.5				
14	Develop and review quarterly Implementation Plan Status Reports Q1 2026.	3/3/2026	3/14/2026	1		2					
15	Develop and review quarterly Implementation Plan Status Reports Q2 2026.	6/2/2026	6/13/2026	1		2					
16	Update Implementation Plan tracker.	1/17/2026	6/30/2026	3		9					
17	Allowance for unanticipated but inevitable tasks.	5/1/2025	3/31/2026	6	3	1	3			4	
Subtotal for phase - billable hours				23	16.75	40	22.5	0	0	4	0
Subtotal for phase - non-billable hours				0	0	0	0	0	0	0	0
Subtotal for phase - professional fees				\$5,405.00	\$3,433.75	\$5,800.00	\$3,937.50	\$0.00	\$0.00	\$580.00	\$0.00

<b>Phase 2: Meetings and Collaboration</b>											
Quarterly Collaboration Meetings											
18	June 2025: Meeting attendance and information sharing.	6/1/2025	6/30/2025	2		2					

Task #	Task	Start Date	End Date	Kelly Marschall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfothenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
19	September 2025: Quarterly Collaboration Meeting attendance and information sharing.	9/1/2025	9/30/2025	2		2					
20	January 2026: Quarterly Collaboration Meeting attendance and information sharing.	1/1/2026	1/31/2026		2	2					
21	March 2026: Quarterly Collaboration Meeting attendance and information sharing.	3/1/2026	3/31/2026		2	2					
22	Allowance for one additional Quarterly Meeting as requested and required to support implementation.	6/3/2025	6/30/2025		1	1					
Ad Hoc Meetings and Communication											
23	July-Sept. 2025: Allowance for Ad Hoc meeting preparation, facilitation, documentation and follow up.	7/1/2025	9/30/2025	3	3	3	3				3
24	Oct-Dec 2025: Allowance for Ad Hoc meeting preparation, facilitation, documentation and follow up.	10/1/2025	12/31/2025	3	3	3	3				3
25	Jan-March 2026: Allowance for Ad Hoc Meeting preparation, facilitation, documentation and follow up.	1/1/2026	3/31/2026		3	3	3				3
26	Apr-Jun 2026: Allowance for Ad Hoc meeting preparation, facilitation, documentation and follow up.	4/1/2026	6/30/2026		3	3	3				3
27	On demand support for Ad Hoc meetings.	7/1/2025	6/30/2026	1.5	3	3	3			3	3
28	Allowance for unanticipated but inevitable tasks.	7/1/2025	6/30/2026	2	2	3	2			0.5	2

Subtotal for phase - billable hours	13.5	22	27	17	0	0	3.5	17
Subtotal for phase - non-billable hours	0	0	0	0	0	0	0	0
Subtotal for phase - professional fees	\$3,172.50	\$4,510.00	\$3,915.00	\$2,975.00	\$0.00	\$0.00	\$507.50	\$2,040.00

Phase 3: SIM Initiative Support											
29	July 2025 Initiative Support - Data Outcomes	7/1/2025	7/31/2025	3	1	3	3			3	
30	July 2025 Initiative Support - BH & SH Mapping	7/1/2025	7/31/2025	3	1	3	3				

Task #	Task	Start Date	End Date	Kelly Marshall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfotenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
31	July 2025 Initiative Support - Youth Wraparound	7/1/2025	7/31/2025	1		1					
32	July 2025 Initiative Support - Other	7/1/2025	7/31/2025	1		1					
33	August 2025 Initiative Support - Data Outcomes	8/1/2025	8/31/2025	3	1	3	3			3	
34	August 2025 Initiative Support - BH & SH Mapping	8/1/2025	8/31/2025	3	1	3	3				
35	August 2025 Initiative Support - Youth Wraparound	8/1/2025	8/31/2025	1		1					
36	August 2025 Initiative Support - Other	8/1/2025	8/31/2025	1		1					
37	September 2025 Initiative Support - Data Outcomes	9/1/2025	9/30/2025	3	1	3	3			3	
38	September 2025 Initiative Support - BH & SH Mapping	9/1/2025	9/30/2025	3	1	3	3				
39	September 2025 Initiative Support - Youth Wraparound	9/1/2025	9/30/2025	1		1					
40	September 2025 Initiative Support - Other	9/1/2025	9/30/2025	1		1					
41	October 2025 Initiative Support - Data Outcomes	10/1/2025	10/31/2025	3	1	3	3			3	
42	October 2025 Initiative Support - BH & SH Mapping	10/1/2025	10/31/2025	3	1	3	3				
43	October 2025 Initiative Support - Youth Wraparound	10/1/2025	10/31/2025	1		1					
44	October 2025 Initiative Support - Other	10/1/2025	10/31/2025	1		1					
45	November 2025 Initiative Support - Data Outcomes	11/1/2025	11/30/2025	3	1	3	3			3	
46	November 2025 Initiative Support - BH & SH Mapping	11/1/2025	11/30/2025	3	1	3	3				
47	November 2025 Initiative Support - Youth Wraparound	11/1/2025	11/30/2025	1		1					
48	November 2025 Initiative Support - Other	11/1/2025	11/30/2025	1		1					

Task #	Task	Start Date	End Date	Kelly Marschall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfothenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
49	December 2025 Initiative Support - Data Outcomes	12/1/2025	12/31/2025	3	1	3	3			3	
50	December 2025 Initiative Support - BH & SH Mapping	12/1/2025	12/31/2025	3	1	3	3				
51	December 2025 Initiative Support - Youth Wraparound	12/1/2025	12/31/2025	1		1					
52	December 2025 Initiative Support - Other	12/1/2025	12/31/2025	1		1					
53	January 2026 Initiative Support - Other	1/1/2026	1/31/2026	3	1	3	3			3	
54	January 2026 Initiative Support - Other	1/1/2026	1/31/2026	3	1	3	3				
55	January 2026 Initiative Support - Youth Wraparound	1/1/2026	1/31/2026		1	1					
56	January 2026 Initiative Support - Other	1/1/2026	1/31/2026	1		1					
57	February 2026 Initiative Support - Other	2/1/2026	2/28/2026	3	1	3	3			3	
58	February 2026 Initiative Support - Other	2/1/2026	2/28/2026	3	1	3	3				
59	February 2026 Initiative Support - Youth Wraparound	2/1/2026	2/28/2026		1	1					
60	February 2026 Initiative Support - Other	2/1/2026	2/28/2026	1		1					
61	March 2026 Initiative Support - Other	3/1/2026	3/31/2026	3	1	3	3			3	
62	March 2026 Initiative Support - Other	3/1/2026	3/31/2026	3	1	3	3				
63	March 2026 Initiative Support - Youth Wraparound	3/1/2026	3/31/2026	1	1	1					
64	March 2026 Initiative Support - Other	3/1/2026	3/31/2026	1		1					
65	April 2026 Initiative Support - Other	4/1/2026	4/30/2026	3	1	3	3			3	



Task #	Task	Start Date	End Date	Kelly Marschall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfothenauer	Kris Barats	Judith Bartlett	Deanna Lyons
66	April 2026 Initiative Support - Other	4/1/2026	4/30/2026	3	1	3	3				
67	April 2026 Initiative Support - Youth Wraparound	4/1/2026	4/30/2026		1	1					
68	April 2026 Initiative Support - Other	4/1/2026	4/30/2026	1		1					
69	May 2026 Initiative Support - Other	5/1/2026	5/31/2026	1	1	3	3			3	
70	May 2026 Initiative Support - Other	5/1/2026	5/31/2026	3	1	3	3				
71	May 2026 Initiative Support - Youth Wraparound	5/1/2026	5/31/2026		1	1					
72	May 2026 Initiative Support - Other	5/1/2026	5/31/2026	1		1					
73	June 2026 Initiative Support - Other	6/1/2026	6/30/2026	1	1	3	3			3	
74	June 2026 Initiative Support - Other	6/1/2026	6/30/2026	3	1	3	3				
75	June 2026 Initiative Support - Youth Wraparound	6/1/2026	6/30/2026		1	1					
76	June 2026 Initiative Support - Other	6/1/2026	6/30/2026		1	1					
77	Project communications between SEI and other external stakeholders as needed.	10/1/2025	6/30/2026	3	3	3	3			3	
78	Create monthly invoices and status reports for the administration of the work order with the Health District.	10/1/2025	6/30/2026	7		14		14	3		
79	Ad hoc communication throughout the project via email or in person.	10/1/2025	6/30/2026	4.5	4.5	4.5	4.5			4.5	
80	Allowance for unanticipated but inevitable tasks throughout this phase.	10/1/2025	6/30/2026	6	4	8	4	1	1	4	2

Subtotal for phase - billable hours

106.5

42.5

125.5

83.5

15

4

47.5

2

Subtotal for phase - non-billable hours

0

0

0

0

0

0

0

0

Subtotal for phase - professional fees

\$25,027.50

\$8,712.50

\$18,197.50

\$14,612.50

\$3,075.00

\$480.00

\$6,887.50

\$240.00

Task #	Task	Start Date	End Date	Kelly Marshall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfortenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
<b>Phase 4: Project Management and Communications</b>											
81	May - July 2025: Project communications between internal SEI resources.	5/1/2025	7/31/2025	1	1	1	1			1	1
82	Aug - Sept. 2025: Project communications between internal SEI resources.	8/1/2025	9/30/2025	3	3	3	3			3	3
83	Oct - Dec 2025: Project communications between internal SEI resources.	9/1/2025	12/31/2025	3	3	3	3			3	3
84	Jan - Mar 2026: Project communications between internal SEI resources.	1/1/2026	3/31/2026	3	3	3	3			3	3
85	Apr - June 2026: Project communications between internal SEI resources.	4/1/2026	6/30/2026	3	3	3	3			3	3
86	Draft and review agendas and notes for monthly project management meetings.	5/1/2025	6/30/2026	4		7					
87	July 2025: Allowance for monthly project management meetings.	7/1/2025	7/31/2025	1.25	1.25	1.25	1.25				
88	August 2025: Allowance for monthly project management meetings.	8/1/2025	8/31/2025	1.25	1.25	1.25	1.25				
89	September 2025: Allowance for monthly project management meetings.	9/1/2025	9/30/2025	1.25	1.25	1.25	1.25				
90	October 2025: Allowance for monthly project management meetings.	10/1/2025	10/31/2025	1.25	1.25	1.25	1.25				
91	November 2025: Allowance for monthly project management meetings.	11/1/2025	11/30/2025	1.25	1.25	1.25	1.25				
92	December 2025: Allowance for monthly project management meetings.	12/1/2025	12/31/2025	1.25	1.25	1.25	1.25				
93	January 2026: Allowance for monthly project management meetings.	1/1/2026	1/31/2026	1.25	1.25	1.25	1.25				
94	February 2026: Allowance for monthly project management meetings.	2/1/2026	2/28/2026	1.25	1.25	1.25	1.25				
95	March 2026: Allowance for monthly project management meetings.	3/1/2026	3/31/2026	1.25	1.25	1.25	1.25				
96	April 2026: Allowance for monthly project management meetings.	4/1/2026	4/30/2026	1.25	1.25	1.25	1.25				

Task #	Task	Start Date	End Date	Kelly Marschall	Marika Baren	Vanessa Helfrick Paulus	Jessie Henderson	Paul Pfothenhauer	Kris Barats	Judith Bartlett	Deanna Lyons
97	May 2026: Allowance for monthly project management meetings.	5/1/2026	5/31/2026	1.25	1.25	1.25	1.25				
98	June 2026: Allowance for monthly project management meetings.	6/1/2026	6/30/2026	1.25	1.25	1.25	1.25				
99	Allowance for real-time project management.	6/1/2025	6/30/2026	3		7					
100	Project communications to follow up on project management issues.	6/1/2025	6/30/2026	2	4	6					
101	Coordination with Washoe County on demand.	6/1/2025	6/30/2026	2	4	6					
102	Allowance for unanticipated but inevitable tasks throughout the phase.	6/1/2025	6/30/2026	6	3	6	2			3	
Subtotal for phase - billable hours				45	39	60	30	0	0	16	13
Subtotal for phase - non-billable hours				0	0	0	0	0	0	0	0
Subtotal for phase - professional fees				\$10,575.00	\$7,995.00	\$8,700.00	\$5,250.00	\$0.00	\$0.00	\$2,320.00	\$1,560.00
Total											
Hours - billable				835.75	188	120.25	153	15	4	71	32
Hours - non-billable				0	0	0	0	0	0	0	0
Professional fees				\$149,908.75	\$44,180.00	\$24,651.25	\$26,775.00	\$3,075.00	\$480.00	\$10,295.00	\$3,840.00



**EXHIBIT B****INSURANCE, HOLD HARMLESS AND INDEMNIFICATION REQUIREMENTS FOR  
PROFESSIONAL SERVICE AGREEMENTS  
2025-26 WASHOE SIM PLANNING AND IMPLEMENTATION****INDEMNIFICATION****CONTRACTOR Liability**

As respects acts, errors or omissions in the performance of CONTRACTOR services, CONTRACTOR agrees to indemnify and hold harmless COUNTY, its officers, agents, employees, and volunteers from and against any and all claims, demands, defense costs, or liability to the extent caused by CONTRACTOR'S negligent acts, errors or omissions in the performance of its CONTRACTOR services under the terms of this agreement.

CONTRACTOR further agrees to defend COUNTY and assume all costs, expenses and liabilities of any nature to which COUNTY may be subjected as a result of any claim, demand, action or cause of action arising out of the negligent acts, errors or omissions of CONTRACTOR or its Sub-contractor in the performance of their CONTRACTOR services under the Agreement.

**General Liability**

As respects all acts or omissions which do not arise directly out of the performance of CONTRACTOR services, including but not limited to those acts or omissions normally covered by general and automobile liability insurance, CONTRACTOR agrees to indemnify, defend (at COUNTY'S option), and hold harmless COUNTY, its officers, agents, employees, and volunteers from and against any and all claims, demands, defense costs, or liability arising out of any acts or omissions of CONTRACTOR (or Sub-contractor, if any) while acting under the terms of this agreement; excepting those which arise out of the negligence of COUNTY.

In determining the nature of the claim against COUNTY, the incident underlying the claim shall determine the nature of the claim, notwithstanding the form of the allegations against COUNTY.

**GENERAL REQUIREMENTS**

COUNTY requires that CONTRACTOR purchase Industrial Insurance (Workers' Compensation), General and Auto Liability, and Professional Errors and Omissions Liability Insurance as described below against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work here under by CONTRACTOR, its agents, representatives, employees or Sub-contractors. The cost of all such insurance shall be borne by CONTRACTOR.

**INDUSTRIAL INSURANCE**

It is understood and agreed that there shall be no Industrial Insurance coverage provided for CONTRACTOR or any Sub-contractor by COUNTY. CONTRACTOR agrees, as a precondition to the performance of any work under this Agreement and as a precondition to any obligation of the COUNTY to make any payment under this Agreement to provide COUNTY with a certificate issued by an insurer in accordance with NRS 616B.627 and NRS 617.210.

If CONTRACTOR or Sub-contractor is a sole proprietor, coverage for the sole proprietor must be purchased and evidence of coverage must appear on the Certificate of Insurance. Such requirement may be waived for a sole proprietor who does not use the services of any employees, subcontractors, or independent contractors and completes an Affirmation of Compliance pursuant to NRS 616B627.

Should CONTRACTOR be self-funded for Industrial insurance, CONTRACTOR shall so notify COUNTY in writing prior to the signing of any agreement. COUNTY reserves the right to approve said retentions and may request additional documentation, financial or otherwise for review prior to the signing of any agreement.

### MINIMUM LIMITS OF INSURANCE

CONTRACTOR shall maintain coverages and limits no less than:

1. General Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, the general aggregate limit shall be increased to equal twice the required occurrence limit or revised to apply separately to this project or location.
2. Automobile Liability: \$N/A combined single limit per accident for bodily injury and property damage. No aggregate limit may apply.
3. Professional Errors and Omissions Liability: \$1,000,000 per occurrence and \$ 3,000,000 as an annual aggregate. Premium costs incurred to increase CONTRACTOR'S insurance levels to meet minimum contract limits shall be borne by the CONTRACTOR at no cost to the COUNTY.

CONTRACTOR will maintain PROFESSIONAL liability insurance during the term of this Agreement and for a period of three (3) years from the date of substantial completion of the project. In the event that CONTRACTOR goes out of business during the term of this Agreement or the three (3) year period described above, CONTRACTOR shall purchase Extended Reporting Coverage for claims arising out of CONTRACTOR'S negligent acts, errors and omissions committed during the term of the Professional Liability Policy.

### DEDUCTIBLES AND SELF-INSURED RETENTIONS

Any deductibles or self-insured retentions must be declared to and approved by the COUNTY Risk Management Division prior to the start of work under this Agreement. COUNTY reserves the right to request additional documentation, financial or otherwise prior to giving its approval of the deductibles and self-insured retention and prior to executing the underlying agreement. Any changes to the deductibles or self-insured retentions made during the term of this Agreement or during the term of any policy must be approved by the COUNTY Risk Manager prior to the change taking effect.

### OTHER INSURANCE PROVISIONS

The policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability Coverages
  - a. COUNTY, its officers, agents, employees and volunteers are to be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of CONTRACTOR, including the insured's general supervision of CONTRACTOR; products and completed operations of CONTRACTOR; or premises owned, occupied or used by CONTRACTOR. The coverage shall contain no special limitations on the scope of protection afforded to the additional insureds, nor shall the rights of the additional insured be affected by the insured's duties after an accident or loss.
  - b. CONTRACTOR'S insurance coverage shall be primary insurance as respects COUNTY, its officers, agents, employees and volunteers. Any insurance or self-insurance maintained by COUNTY, its officers, agents, employees or volunteers shall be excess of CONTRACTOR'S insurance and shall not contribute with it in any way.

- c. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to COUNTY, its officers, agents, employees or volunteers.
- d. CONTRACTOR'S insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
- e. CONTRACTOR'S insurance coverage shall be endorsed to state that coverage shall not be suspended, voided, canceled or non-renewed by either party, reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to COUNTY except for nonpayment of premium.

### ACCEPTABILITY OF INSURERS

Insurance is to be placed with insurers with a Best's rating of no less than A-: VII. COUNTY with the approval of the Risk Manager may accept coverage with carriers having lower Best's ratings upon review of financial information concerning CONTRACTOR and insurance carrier. COUNTY reserves the right to require that the CONTRACTOR'S insurer be a licensed and admitted insurer in the State of Nevada, or on the Insurance Commissioner's approved but not admitted list.

### VERIFICATION OF COVERAGE

CONTRACTOR shall furnish COUNTY with certificates of insurance and with original endorsements affecting coverage required by this exhibit. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The certificates are to be on forms approved by COUNTY. All certificates and endorsements are to be addressed to the specific COUNTY contracting department and be received and approved by COUNTY before work commences. COUNTY reserves the right to require complete, certified copies of all required insurance policies, at any time.

### SUB-CONTRACTORS

CONTRACTOR shall include all Sub-contractors as insureds under its policies or furnish separate certificates and endorsements for each Sub-contractor. Sub-contractor shall be subject to all of the requirements stated herein.

### MISCELLANEOUS CONDITIONS

1. CONTRACTOR shall be responsible for and remedy all damage or loss to any property, including property of COUNTY, caused in whole or in part by CONTRACTOR, any Sub-contractor, or anyone employed, directed or supervised by CONTRACTOR.
2. Nothing herein contained shall be construed as limiting in any way the extent to which CONTRACTOR may be held responsible for payment of damages to persons or property resulting from its operations or the operations of any Sub-contractors under it.
3. In addition to any other remedies COUNTY may have if CONTRACTOR fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, COUNTY may, at its sole option:
  - a. Order CONTRACTOR to stop work under this Agreement and/or withhold any payments which become due CONTRACTOR here under until CONTRACTOR demonstrates compliance with the requirements hereof;
  - b. Terminate the Agreement.

## PURCHASE REQUISITION



Date: 02/07/2025

- ☒ PO Requisition  
☐ ProCard Purchase  
☐ Change Order

PO #: \_\_\_\_\_

Barcode req'd? ☐ Yes ☒ No

## APPROVALS

Supervisor PL  
 DD \_\_\_\_\_  
 DHO CK  
 Technology \_\_\_\_\_  
 Media \_\_\_\_\_

Vendor: Social Entrepreneurs Inc.

Vendor #: 102908

Address: 6548 S. McCarran Blvd. Ste. B, Reno, NV 89509

Fax: 775.324.4941

Contact Name: Kelly Marschall email:kmarschall@socialent.com

Phone: 775.324.4567

	Approvals	Grant/match	Non-grant	ProCard Allowed
Only on ProCards: \$0-\$100 does not require approval prior to allowed ProCard purchases				
\$0-\$1,000	Supervisor	Single quote	Single Quote	<u>Required</u> if suppliers take card  Not to exceed \$10,000.00
\$1,001-\$5,000	Sup & DD			
Professional Service Agreements are required for all services over \$10,000 (grant and non-grant)				
\$5,001-\$50,000	Sup, DD & DHO			
\$50,001-\$100,000	Sup, DD & DHO	2 written quotes (SAM registry over \$25,000)	2 written quotes/ unless exempt under NRS	No
over \$100,000 per contract	DBOH & BCC	<u>Advertised</u> bid or RFP unless exempt under NRS 332.115		
Technology	DSS	Dollar threshold noted above. No purchases of laptops, tablets, cell phones, desktops or software via ProCards. Items such as keyboards, speakers, and other peripheral items may be purchased with ProCard with purchasing or TS approval.		
Media	PH Comm Mgr	all media purchases		

## Additional Information:

FY25/26

Cost Center/ Internal Order	G/L	Complete Description	QTY	Unit Price	AMT
170203	710100	PSA is for 2025-26 Washoe Region SIM	1	150000	\$ 150,000.00
		(Sequential Intercept Model) strategic framework and			\$ 0.00
		initiatives implementation project for the period			\$ 0.00
		April 1, 2025 through June 30, 2026. SEI to provide			\$ 0.00
		project oversight & core team activities, meetings &			\$ 0.00
		collaboration, SIM initiative support, project management,			\$ 0.00
		strategic framework tracker, and progress status reports.			\$ 0.00
		The SIM project is an effort included in NNPH			\$ 0.00
		Community Health Improvement Plan to improve			\$ 0.00
		Behavioral Health.			\$ 0.00
		PO total is \$150,000.00 and will require _____ DBOH			\$ 0.00
		approval _____ and sole source.			\$ 0.00
					\$ 0.00

TOTAL: \$ 150,000.00

Reason for purchase: 2025-26 Washoe Region SIM strategic framework &amp; initiatives implementation project.

Requester: Rayona LaVoie

Division Contact: Falisa Hilliard X2408

(Name and phone number)

Person designated for SAP entry or ProCard purchaser: Falisa Hilliard